





**Version 6.2**

Windows, UNIX, Linux, AIX



**Release Notes**

Before using this information, be sure to read the general information under "Notices," on page 35.

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## About this book

This document outlines Rational Portfolio Manager 6.2 release notes. It covers new features added in this release, a list of known problems, and problems that have been fixed in this release.

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## Who should read this book

This document is intended for any Rational Portfolio Manager user.

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## Proprietary notice

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# Chapter 1. About this release

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## Installing this release

For installation of Rational Portfolio Manager database, middleware, and client on Windows, UNIX, Linux, or AIX refer to installation guides located under %PACKAGE\_ROOT%\Documents directory.

## Documentation Roadmap

All documents accompanying this release are located under %PACKAGE\_ROOT%\Documents directory. The following table describes each of these documents.

*Table 1. Rational Portfolio Manager 6.2 documentations*

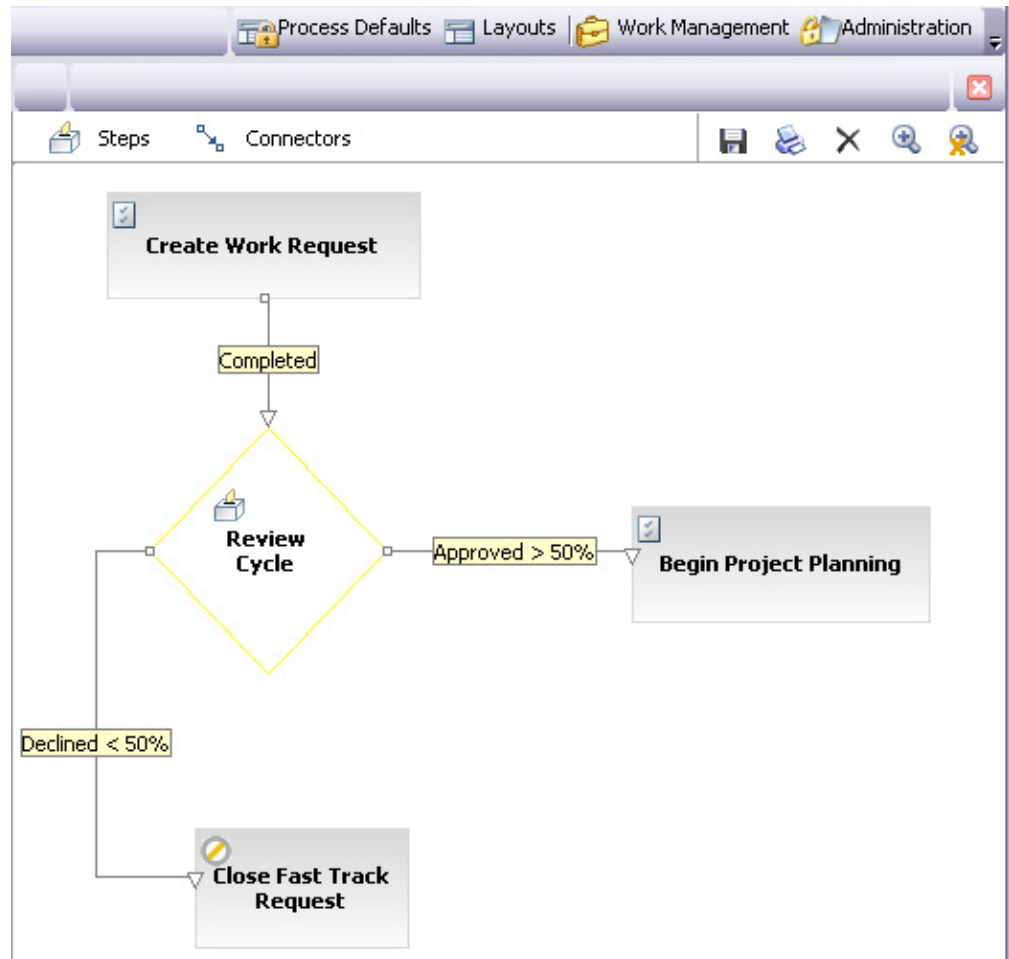
Document	File Name	Description
Windows installation guide	RPM6.2.0.0_Installation_Guide_Windows.pdf	Refer to this document for the installation of Rational Portfolio Manager with DB2 or Oracle databases on Windows.
UNIX installation guide	RMP6.2.0.0_Installation_Guide_Unix.pdf	Refer to this document for the installation of Rational Portfolio Manager with DB2 or Oracle databases on UNIX, Linux, or AIX.
Administration guide	Administration_Guide.pdf	Refer to this document for all post-install activities, including sharing the settings, configuring default calendars and currencies, etc.
RPM/PjC integration guide	RPM_PJC_Integration_Guide.pdf	Refer to this document for integration between Rational Portfolio Manager and Rational ProjectConsole.
Web Services API guide	RPM6.2.0.0_API_Guide.pdf	Refer to this document for the installation and use of Rational Portfolio Manager Web Services API.
Release Notes	RPM6.2.0.0_Release_Notes.pdf	Refer to this document for the Rational Portfolio Manager 6.2 release information, including new features, known problems, problems fixed in this release, support information, changes made in this release, and Web Services API limitations.

## New features in 6.2

This section describes new product features in version 6.2 of Rational Portfolio Manager.

### Designing automated workflow processes

With IBM Rational Portfolio Manager **Workflow Design** you can quickly and easily create, review, and modify automated workflow processes, notify participants, provide checklists, and secure approvals that will generate automatic state and step changes as conditions dictates.



The Rational Portfolio Manager **Workflow Design** model provides Process Authors with the ability to:

- Design workflow processes against any object in Rational Portfolio Manager.
- Define process steps and decision points.
- Provide workflow multi-branching.
- Link or associate items. (items can be any Rational Portfolio Manager elements)
- Restrict the sharing of layouts to designated recipients based on selected security roles.
- Create and add checklist items to a grid and edit the value percentage.

- Design an automated weighted voting process and specify the weight of each vote in percentage. Designate a response time and allow for the creation of response text, as well as offer voters predefined reasons list where they can select a voting response.
- Configure multiple outcomes. (that is generate next state and/or steps)

## Variables used in the Workflow Design query builder

This section lists the condition parameters used in the query builder for project, deliverable, task, and scope elements groups. The screen shot below lists the variables used in the project group.

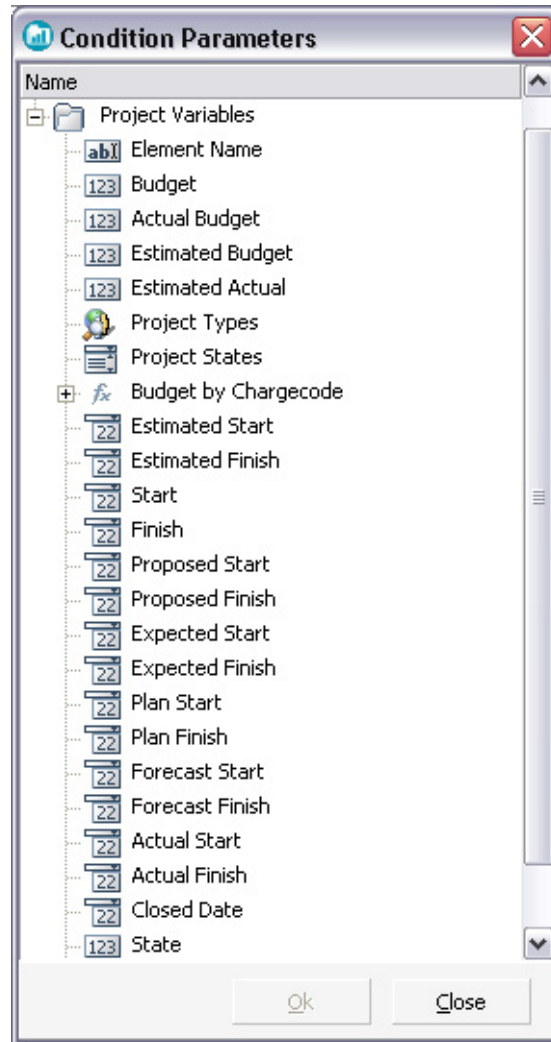


Table 2. Variables used for project, deliverable, task, and scope elements groups

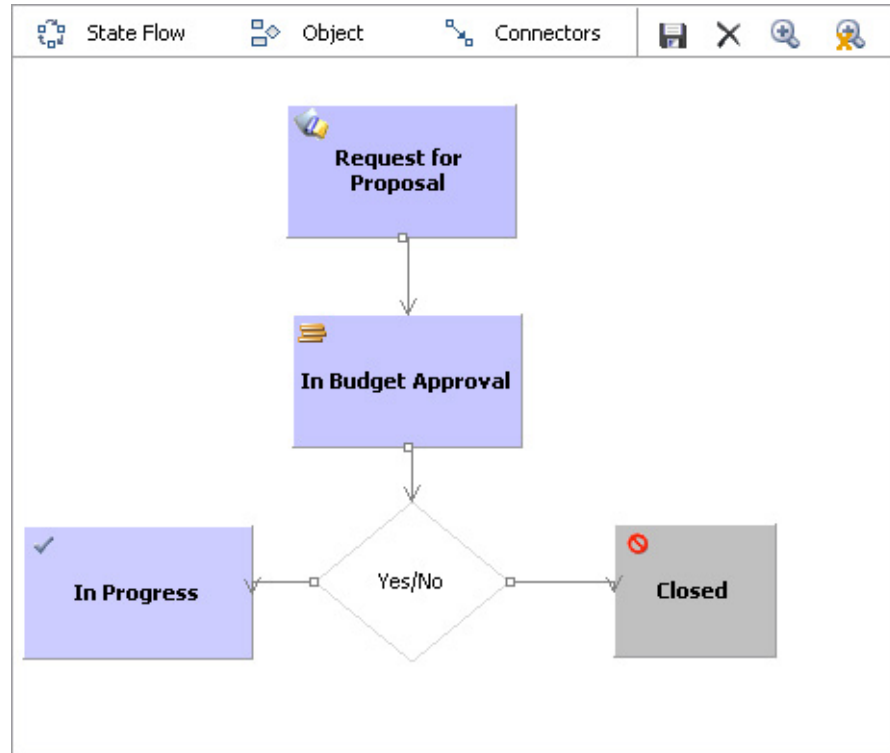
Project group	Deliverable group	Task group	Scope element group
Element Name	Element Name	Element Name	Element Name
Budget	Budget	Budget	
Actual Budget	Actual Budget	Actual Budget	
Estimated Budget	Estimated Budget	Constraint Date	
Estimated Actual	Estimated Actual	Start	

Table 2. Variables used for project, deliverable, task, and scope elements groups (continued)

Project group	Deliverable group	Task group	Scope element group
Project Types	Estimated Start	Finish	
Project States	Estimated Finish	Proposed Start	
Estimated Start	Start	Proposed Finish	
Estimated Finish	Finish	Expected Start	
Start	Proposed Start	Expected Finish	
Finish	Proposed Finish	Plan Start	
Proposed Start	Expected Start	Plan Finish	
Proposed Finish	Expected Finish	Forecast Start	
Expected Start	Plan Start	Forecast Finish	
Expected Finish	Plan Finish	Actual Start	
Plan Start	Forecast Start	Actual Finish	
Plan Finish	Forecast Finish	Closed Date	
Forecast Start	Actual Start	State	
Forecast Finish	Actual Finish		
Actual Start	Closed Date		
Actual Finish	State		
Closed Date			
State			

## Designing state flows

Creating state flowcharts using work management element or scope element states helps you easily position these elements in the portfolio management process.



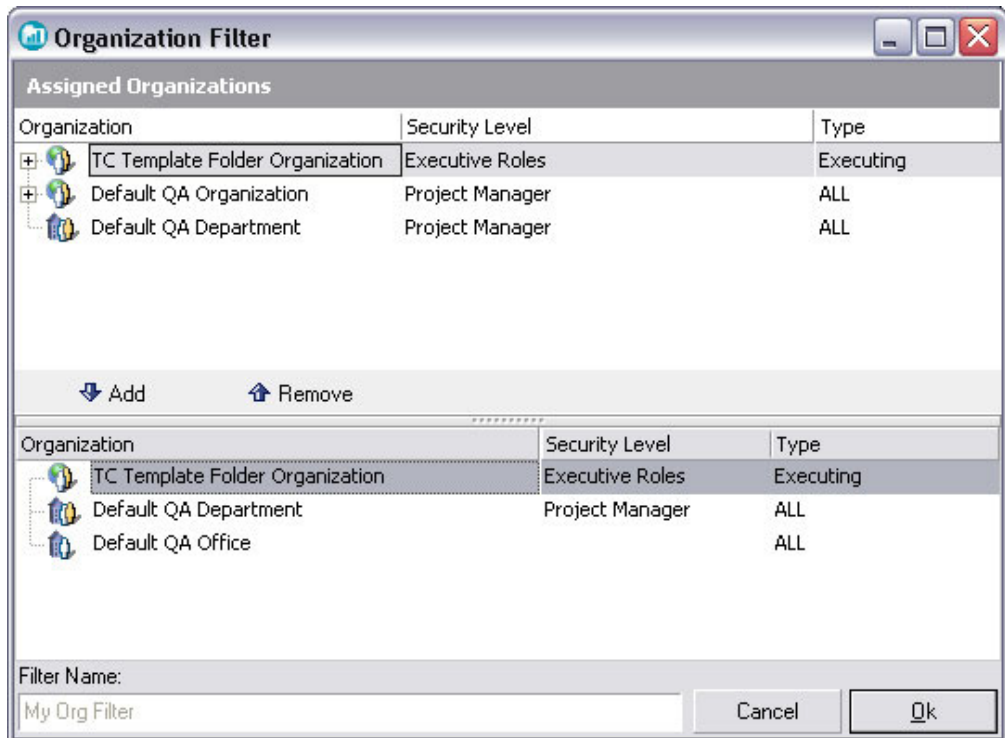
## Accessibility enhancement

Rational Portfolio Manager 6.2 introduces new accessibility features. For a complete list of accessibility features refer to the Rational Portfolio Manager 6.2 online help, Navigation Shortcuts section.

## Assigning organizations to projects

Rational Portfolio Manager supports the assignment of an owning and executing organization for each projects. Owning organization is the organization or a department within the organization that owns the projects, and executing is the organization or a department within the organization that executes the project.

The **Work Management** view can be filtered to display the owning or executing projects that have been assigned to organizations.



## Enforcing time codes in the Timesheets view

In Rational Portfolio Manager you may enter a timesheet and tag a time code to the timesheet record. The timesheet can be entered either on a task directly or one of its steps. The list of time codes is defined at all WBS levels and timesheet users are limited to use this predefined time code list.

This feature allows you to track time entries per sub-activities (time codes) for more granular time tracking than the task assignment, and to be able to categorize all time entries reported across tasks and projects.

## Creating custom fields and portlets

The **Custom Fields** tab in **Application Administration** is used to create custom portlets and fields. The ability to create custom portlets and fields is intended to enable organizations to enter information that is not part of the Rational Portfolio Manager current data set and to use this information to categorize and report project and portfolio performance based on these fields.

You can create custom portlets and fields for project, deliverable, task, scope elements, document, resource, client, and asset groups.

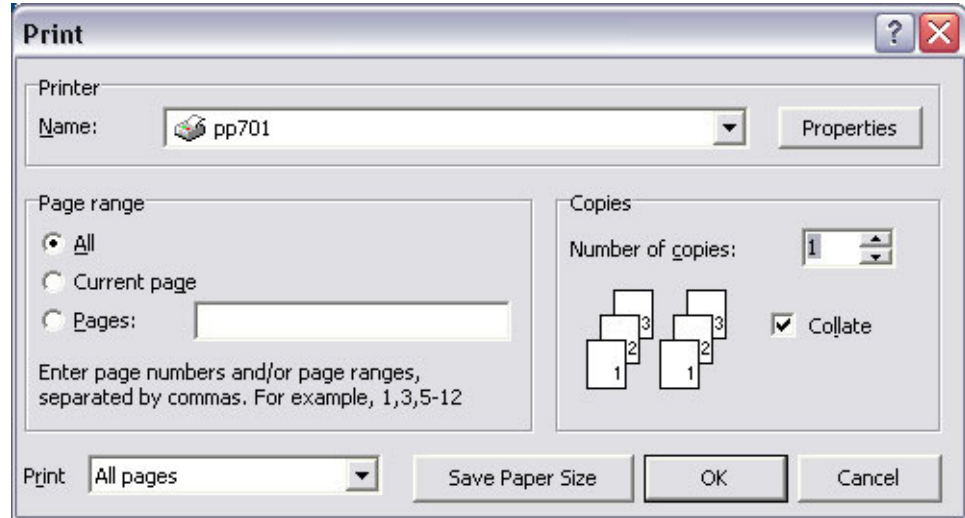
## Creating external actions

The **External Actions** tab in **Application Administration** is used to create external actions to allow a workflow step call a web service. For example, you can create an external action to extract the information from a project element and send that information to other remote systems.



## Saving paper size in the print dialog

You can permanently assign a paper size for printing a report. After saving the paper size setting from the print dialog, the setting is reused whenever the report is printed until you explicitly reset the paper size.



## Hide inactive scorecards

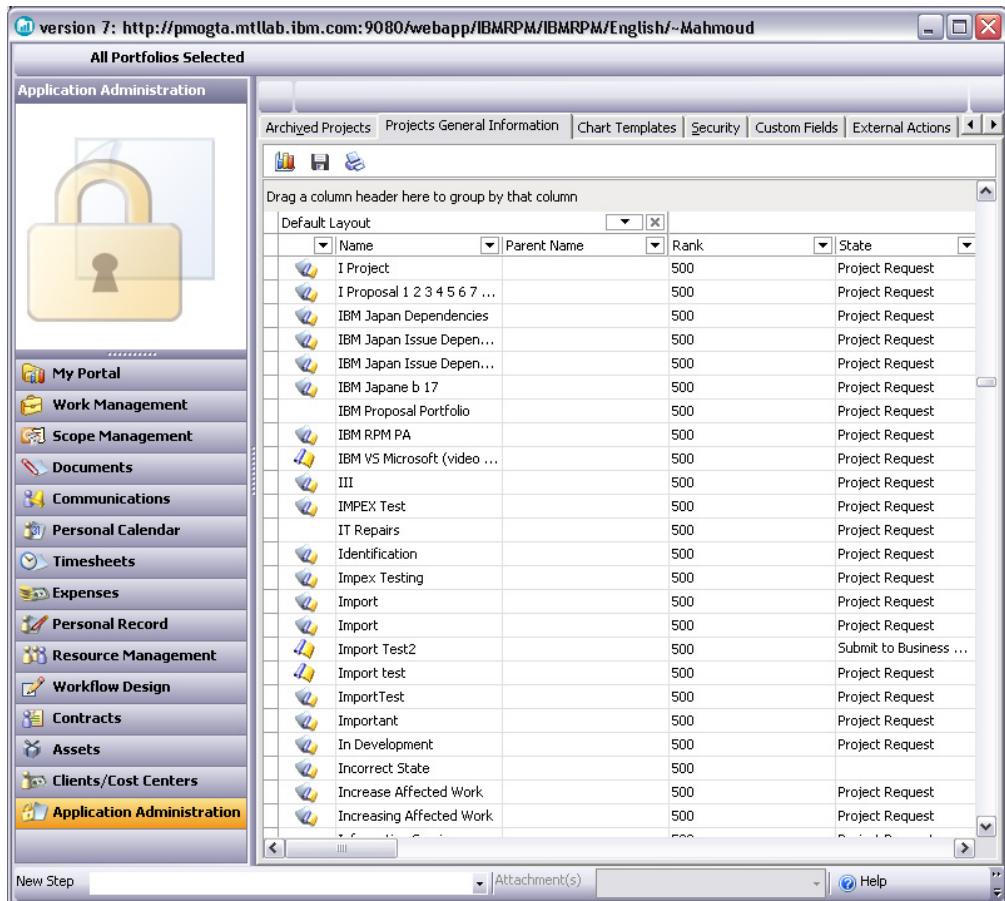
This feature allows system administrators to decide when a scorecard is ready for use (for example, after finishing adding all questions and responses for a new scorecard element). There is a new active, inactive flag implemented at scorecard level. Setting this to inactive allows you to keep the scorecard hidden from other users until it is ready for use.

## Searching the attribute filtered views

When creating attribute filters, you have the options of searching all projects and proposals that contain that attribute or only the selected projects and proposals in **Portfolio Configuration**.

## Project general information in Application Administration

In this tab, users can view all projects and proposals information available in the repository in a graphical pivot table. This information is only available to application administrators, so resources with security rights to **Application Administration** can view this tab.

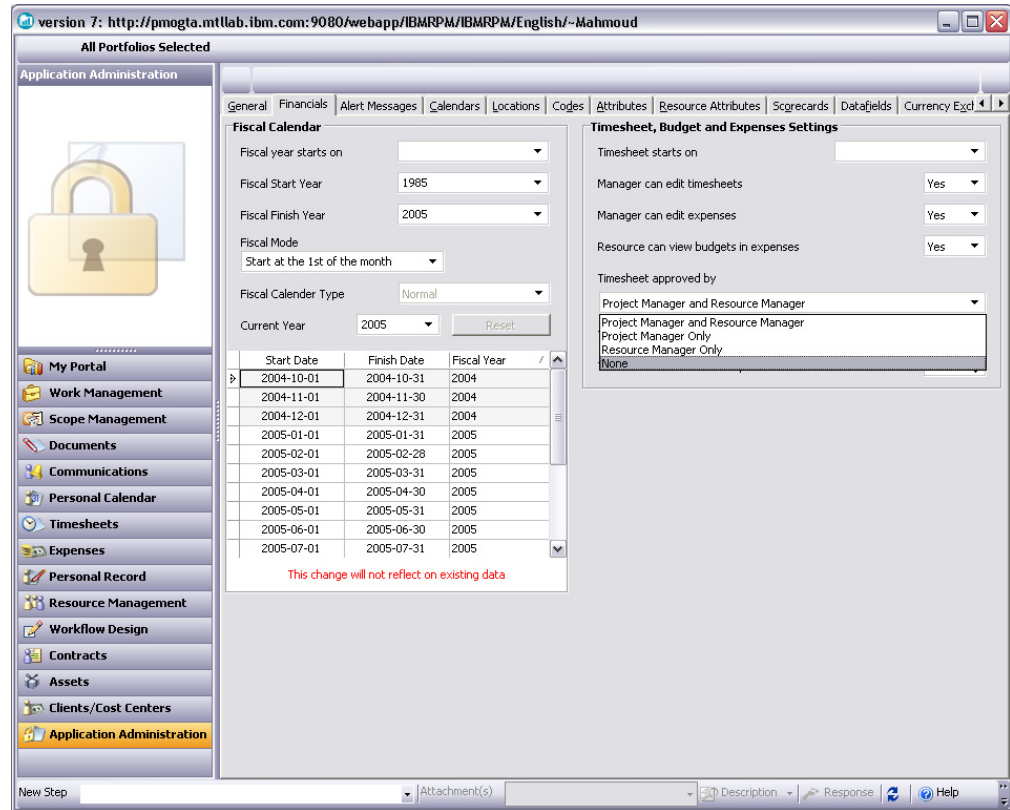


## Sending notifications for multiple elements

In **Work Management**, **Scope Management**, or **Documents** views, resources are able to send notifications for multiple items at the same time. The receivers will receive a separate notification for each item sent.

## Disabling the Submit for Approval button in the Timesheets view

This new feature enables the organizations that are not using the Approval/Rejection model of the **Timesheets** view to disable the **Submit for Approval** button. If this setting is set to **None** in the **Financials** tab of **Application Administration**, the **Submit for Approval** button will be hidden in the **Timesheets** view.

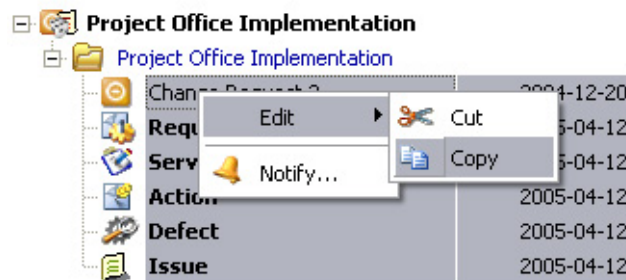


## Customized naming capability for my custom band

This new feature significantly enhances the usability of the two **My Custom** bands in the **Work Management** view. You can customize **Work Management** tree layouts with bands that contain only columns necessary for work. Note that in order to keep the new name, the layout must be saved with a different name. If the layout is not saved or if you overwrite the layout name provided by the server, next time when you log in, the new name will be lost.

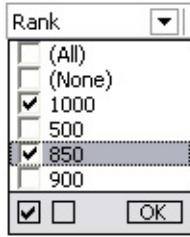
## Copy/cut multiple elements

This new feature provides the ability to copy, paste, and move multiple elements in **Work Management**, **Scope Management**, and **Documents** views at the same time.



## Applying multiple filters to views using headers

You can apply multiple filters to a view in Rational Portfolio Manager using the header drop down menu.



In the above example the view will be filtered to show only the elements with 1000 and 850 ranks.

## Fixed-duration task type

IBM Rational Portfolio Manager 6.2 introduces a new task type called **Fixed Duration**. A fixed-duration task is a task in which the duration is a fixed value and any changes to the work or the assigned units (at the assignment level) don't affect the task's duration.

Identification	
%DC	0.00
Task Name	Task
Rank/Priority	500
Reference #	
Published	None
State	None
Asset Code	None
Asset Name	
External Identifier	
Task Type	Default Task
Effort Driven	Default Task
Mandatory	Fixed Duration

By default, when a new project is created, the task type is set as the **Default Task**. Changing this property to **Fixed Duration** makes each newly created task under that project a fixed-duration task.

## Security right changes at group level

Security rights changes at the group level in **Application Administration** are propagated to the resource level.

## Calculate/leveling of duration-based tasks with %DC>0

Based on actual data, the scheduling engine calculates precisely the initial start date time position of the remainder of the task, imposes constraint types and dates, and moves the remainder of the task to the new valid scheduled dates.

The same is true in the presence of different dependency types. The scheduling engine handles controversial constraints and dependencies, silently violating dependencies and rejecting constraints if they appear to be in contradiction with %DC.

## Supporting multiple closed states

IBM Rational Portfolio Manager allows you to set more than one state to closed. In addition to a reserved state for closed, users can declare other states as closed, by checking the **Closed** check box in the **Application Administration, Datafields, State** tab.

Rank	Value	Closed State
+	State	<input type="checkbox"/>
+	Deliverable State	<input type="checkbox"/>
+	Task State	<input type="checkbox"/>
+	Scorecard State	<input type="checkbox"/>
-	Change Request State	<input type="checkbox"/>
	1	Open
	2	Client Technical Review
	3	Client Financial Review
	4	Client Approved
	5	Client Rejected
	6	Validate CRCloseState
	7	
	8	
	9	
	10	
	11	
	12	
	13	
	14	
	15	
	16	
	17	
	18	
	19	
	20	In Progress
	21	To be validated
	22	Closed

**Note:** Besides the **Closed** state, you are not allowed to mark the reserved states in orange color, as closed.

## Append-only Rich Text Format (RTF) portlet functionality

IBM Rational Portfolio Manager 6.2 introduces a new RTF portlet called **Append-only**. An append-only RTF is an RTF portlet that preserves the history of previously entered text as read only. (discussion type)

## Viewing timesheet notes in pivots and reports

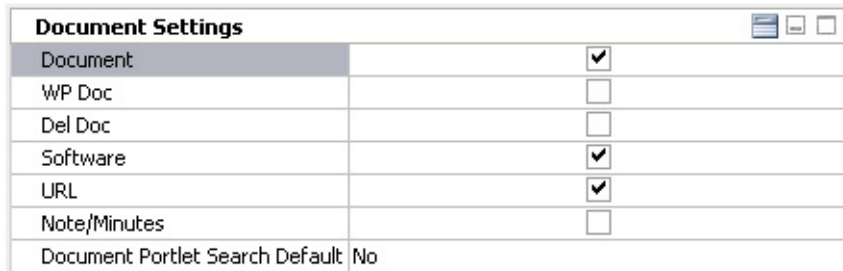
Notes that are entered in a timesheet can be viewed from all timesheet pivots and reports.

## Attribute filtering is available without having to save

Some organizations have many system attributes that are used extensively and momentarily. IBM Rational Portfolio Manager supports of applying these attributes without having to name and save them.

## Restricting document attach options

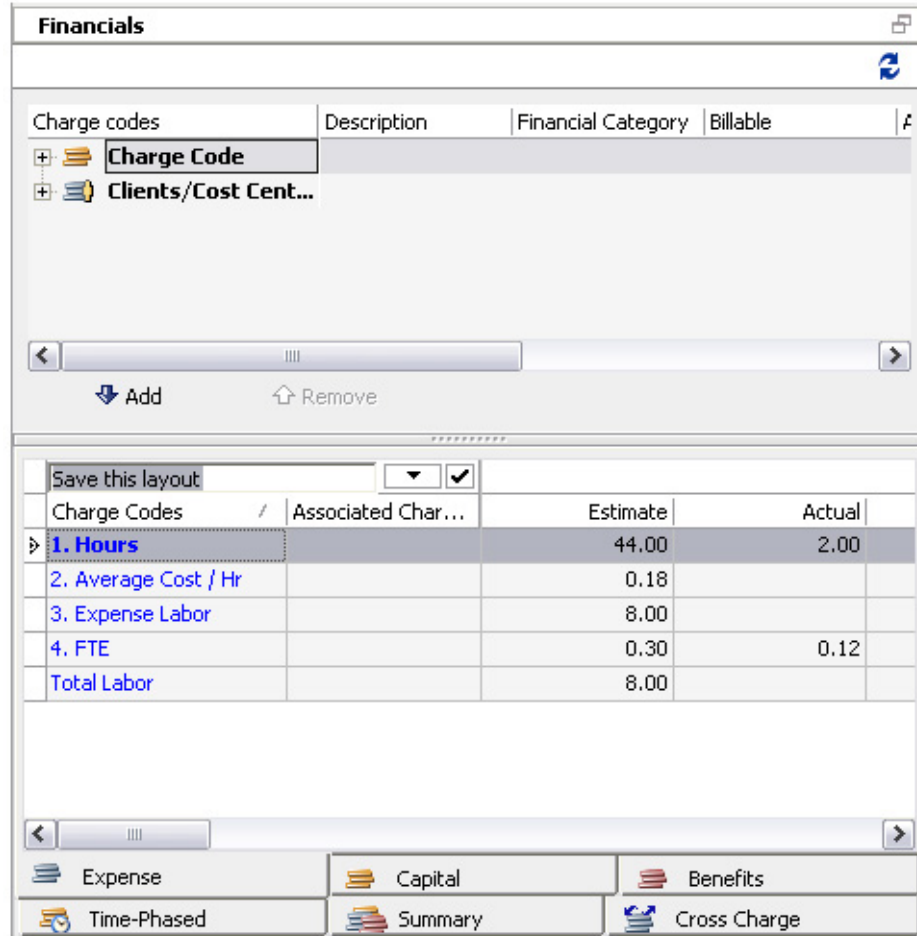
This feature provides the ability to customize what document types can be created. This is done in the **Document Settings** portlet of the project description view. Unused document types will be removed from the drag and drop toolbar in the **Documents** view or portlet.



Document Settings	
Document	<input checked="" type="checkbox"/>
WP Doc	<input type="checkbox"/>
Del Doc	<input type="checkbox"/>
Software	<input checked="" type="checkbox"/>
URL	<input checked="" type="checkbox"/>
Note/Minutes	<input type="checkbox"/>
Document Portlet Search Default	No

## Saving financial layouts

This feature provides the ability to save the layouts in **Financials** portlets of project, deliverable, and task description views.

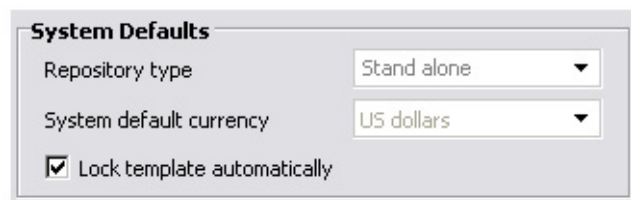


## Adding WBS ID to Timesheets view

The WBS ID column is added to the Timesheets view at project, deliverable, and task level to show the element's unique ID number.

## Lock and unlock templates

This feature provides the ability to lock or unlock **Work Management**, **Scope Management**, and **Document** templates automatically or manually. If **Lock template automatically** is unchecked in the **General** tab of **Application Administration**, then all newly created templates are unlocked.

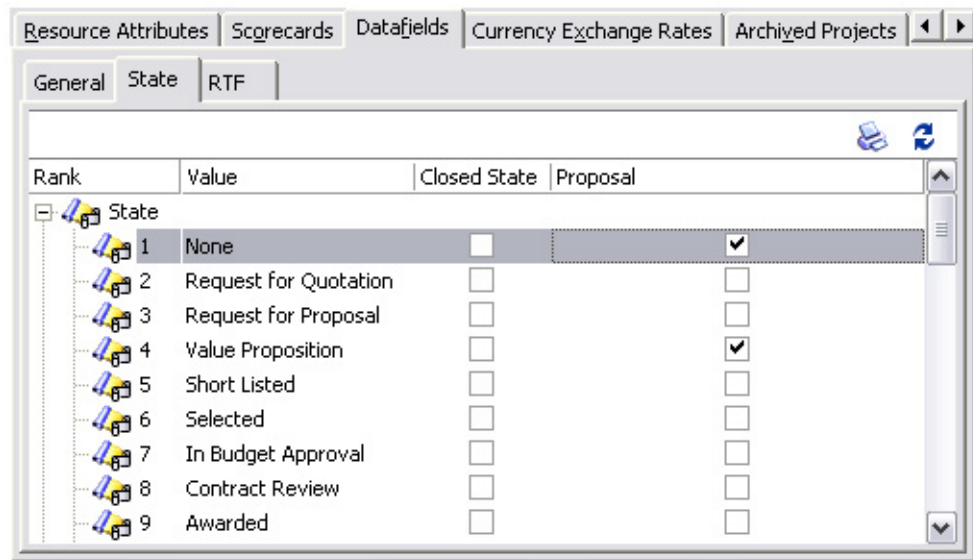


## Mandatory tasks

This feature provides the ability to flag tasks as mandatory. Making the task mandatory will allow only the users with security rights to delete that task.

## Separate states for proposals and projects

This feature provides the ability to create separate states for a proposal object versus a project object.



## Managing template folders

This feature provides the ability to manage template folders. In order to create template folders, resources need to have security rights assigned to them. The resource that creates a template folder has the security right of the **Folder Manager** by default. The next resource that is assigned to the folder is **Folder Responsible**. If the template folder is assigned to the organization or the resource pool, then all resources within the organization or the pool have **Folder Visitor** security rights.

## Changing resource's calendar

This feature provides resource managers the ability to change a resource calendar at any time.

When changing a resource calendar that already has assignment elements with effort, the existing assignment will not be affected until the leveling or rescheduling of the assignment is executed. After execution, the new assignments of the resource will consider his/her new calendar.

## Pool view show and hide option

This feature provides the ability to show or hide inactive resources, completed assignments, and closed assignments in the **Resource Management** view.

## Earned Value parameters in reports

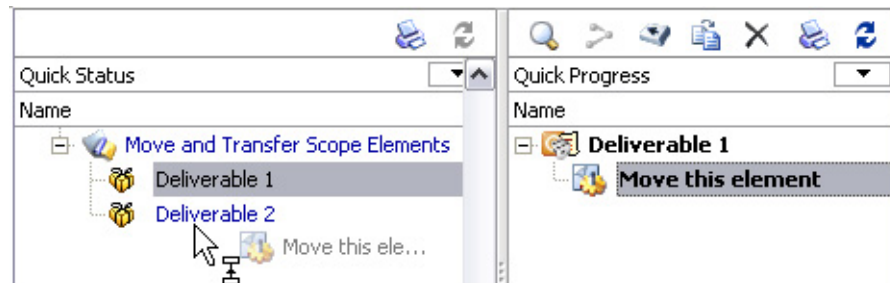
The Earned Value delay is presented in the Single Project EV report. This reporting visibility allows the user to know that the EV calculation has a delay of number of weeks based on the parameters entered in the **General** tab of **Application Administration**.



Capacity Planning and Earned Value	
Max Staff Acquisition results	50 ▼
EV Delay (weeks)	0 ▼

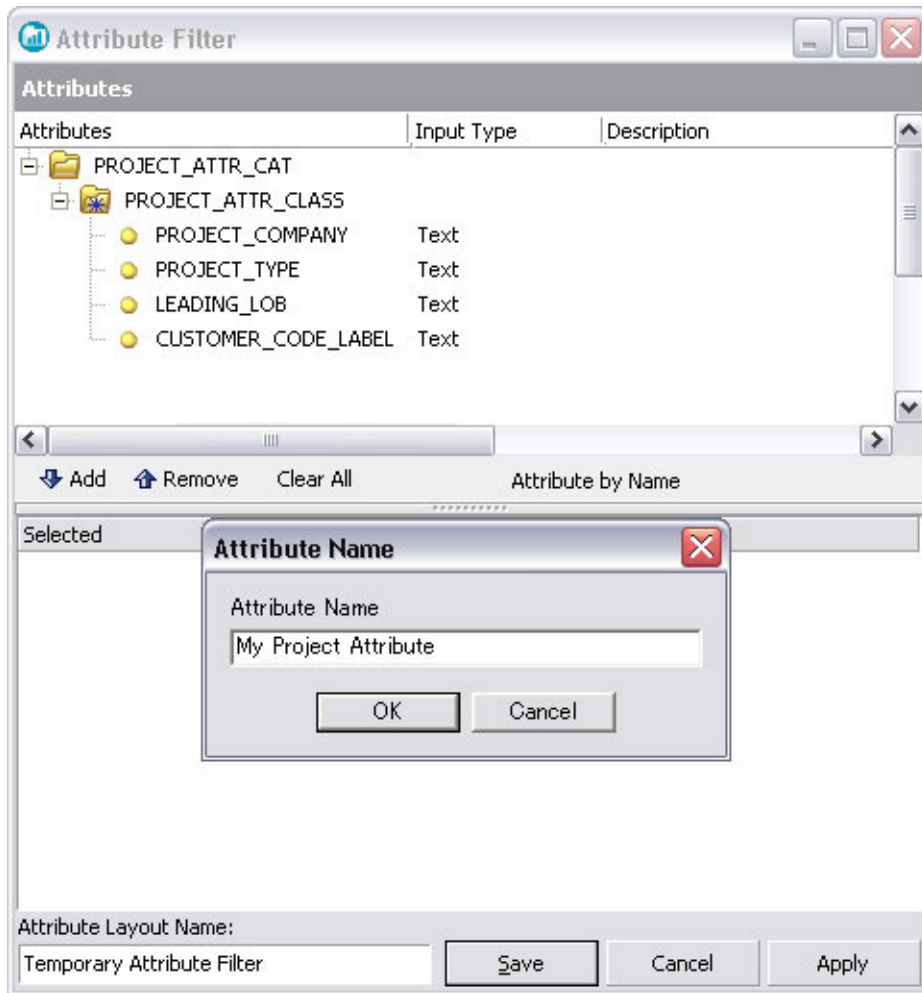
## Moving and transferring scope elements

This feature provides the ability to move and transfer scope elements into another WBS item within the same project.



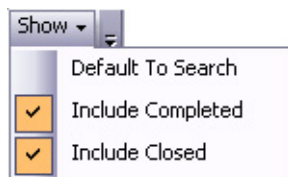
## Filtering the view using project-defined (local) attributes

This feature provides the ability to filter **Work Management**, **Scope Management**, and **Documents** views using project-defined (local) attributes.



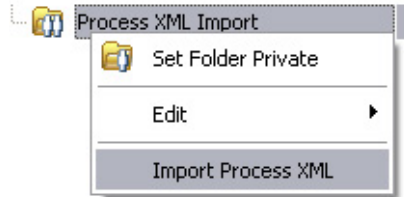
## Viewing the closed and completed items in an attribute filtered view

This feature provides the ability to view all closed and completed items in an attribute filtered view.



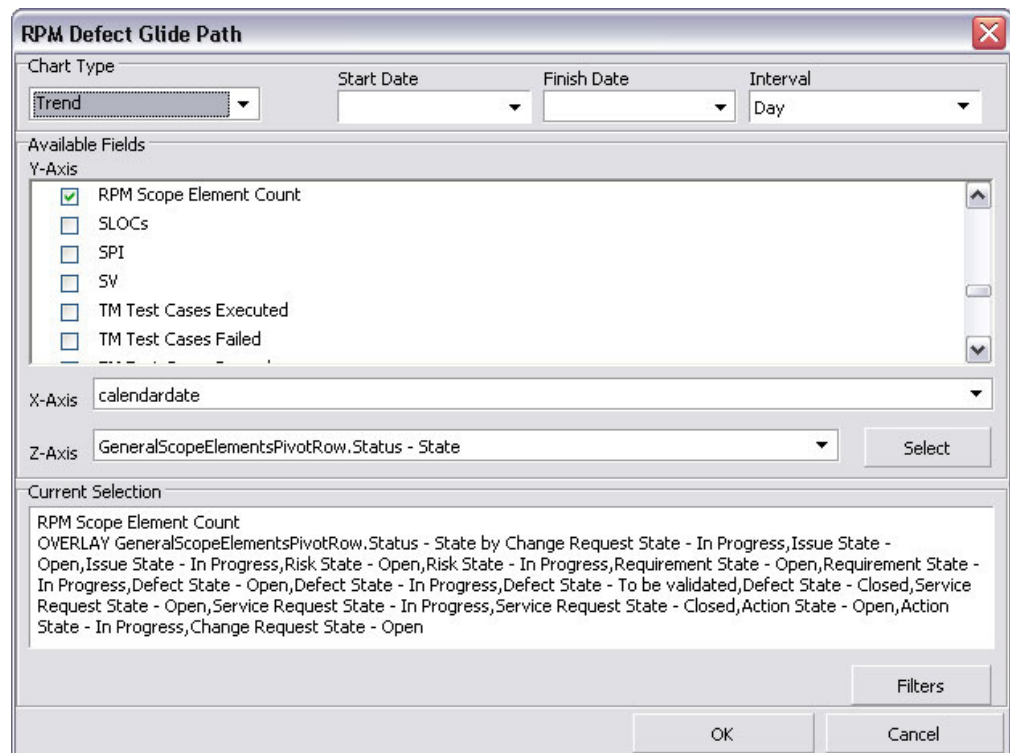
## Importing process XML templates

The main purpose of importing **Process XML** templates to Rational Portfolio Manager is to enable clients to create a WBS that is implicitly synchronized with their method content. Rational Portfolio Manager allows you to import a custom WBS, which was exported to an XML file. Resources with access rights to **Templates** view can import XML template files.



## Metrics Designer

**Metrics Designer** is the project data analysis component of Rational Portfolio Manager. The **Metrics Designer** displays measurements graphically in charts so that you can instantly assess the true status of your projects and make decisions based on complete and objective information. Resources with **Application Administration** rights can design metrics charts in the **Chart Templates** tab and assign the charts to different security roles in the **Security** tab. These charts can be viewed in **My Portal** page by resource with access rights.



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## Announcements, changes, and limitations

This section contains announcements about important changes to Rational Portfolio Manager.

### Workflow designer

Rational Portfolio Manager 6.2 introduces a new enhanced workflow engine. The old workflow will be available only to existing clients. The migrated version of Rational Portfolio Manager can disable the old workflow functionality by clicking the **Disable old workflow functionality** button from the **General** tab of **Application Administration**.

**Note:** Executing this action will remove the **Workflow** tab from **Application Administration** and cannot be undone.

### Workflow Actions

Workflow actions was originally designed for all workflow items and described in the online help. This feature works only on project, deliverable, and task workflow processes and it is disabled for scope and document elements.

### Renaming the workflow roles

When creating workflow roles in the **Participants** tab of **Workflow Designer**, after creation, the name cannot be modified. In order to rename the workflow role, the role has to be deleted from the **Participants** tab, renamed in the **Workflow Roles** dialog, and assigned again.



### Workflow external actions

In order to successfully run workflow external actions, you need to:

1. Create a web service with invoke method that takes two (2) parameters:
  - Invoke (String, Integer)
2. Deploy the web services on an application server.
3. Enter the web service URL in the **Path** field of **Application Administration, External Actions** tab.

### Pivots and reports in the Resource Management view

Pivots and reports in the **Resource Management** view were moved from the filter area to the toolbar. To generate pivots or reports in the **Resource Management** view:

1. Select  **Resource Management** from the navigation bars.
2. Click the  **Pivots/Reports** icon from the toolbar.
3. Select the desired reports or pivots from the **OLAP Pivots** or **Reports** drop down lists.

### Database and Application Server support

The following tables describe the changes that have been made to the support of database and application server.

*Table 3. Rational Portfolio Manager 6.2 database support*

Database	Version	Operating System
DB2	V 8.1 - FP 7, 9a, 10 †	Windows 2000 Fix pack 4

Table 3. Rational Portfolio Manager 6.2 database support (continued)

Database	Version	Operating System
DB2	V 8.1 - FP 7, 9a, 10 †	Windows 2003
DB2	V 8.1 - FP 7, 9a, 10 †	AIX 5.2.0.0.5
DB2	V 8.1 - FP 7, 9a, 10 †	RedHat Linux AS version 3
DB2	V 8.1 - FP 7, 9a, 10 †	SuSE Linux v9.1
Oracle	V 9.2.0.1	Windows 2000
Oracle	V 9.2.0.1	Windows 2003
Oracle	V 9.2.0.1	Solaris 2.8/2.9
Oracle	V 9.2.0.1	HP-UX B.11
Oracle	V 9.2.0.4	RedHat Linux AS version 3
Oracle	V 9.2.0.4	SuSE Linux v9.1
Oracle	V 10.2.0.1	Windows 2000 Fix pack 4
Oracle	V 10.2.0.1	Windows 2003

†: For DB2 Express, IBM recommends no more than 25 users. DB2 Enterprise or DB2 Workgroup are recommended for optimal usage.

**Note:** Rational Portfolio Manager 6.2 does not support DB2 V 7.2.

Table 4. Rational Portfolio Manager 6.2 application server support

Application Server	Version
WebSphere	V 5.1 and 6.0
Apache Tomcat	V 5.5
WebLogic	V 8.1
Oracle Application Server	V 9i

Table 5. Rational Portfolio Manager 6.2 application server support for Web Services

Header	Header
WebSphere	V 5.1 and 6.0
Apache Tomcat	V 5.0
Oracle Application Server	V 9.0.4 and 10

## Localized version

Rational Portfolio Manager 6.2 does not support the Japanese version that was included in the 6.1 release.

Rational Portfolio Manager 6.2 has limited character encoding support. When the Rational Portfolio Manager client is launched, the application code page is detected from the Windows OS. The default is English (1252).

Rational Portfolio Manager 6.2 supports ten (10) of the twelve (12) code pages used on Windows:

- English (1252)
- Japanese (932)

- Korean (949)
- Simplified Chinese (936)
- Traditional Chinese (950)
- Greek (1253)
- Turkish (1254)
- Baltic (1257)
- Russian (1251)
- Eastern European (1250)

**Note:** Rational Portfolio Manager 6.2 can only be used in a single code page environment. Each client and server must be set to the same code page regardless of its location, or there will be character corruption.

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## Chapter 2. Web Services API

This section contains late-breaking information about limitations of the Rational Portfolio Manager Web Services Application Programming Interface (API). Interfaces that are available with this release include:

- Application Administration
- Resource Management
- Client/Cost Center

Interfaces that are not available in this release include:

- Assets
- Documents
- Work Management (WBS)
- Scope Management
- Timesheets
- Contracts

New releases of Web Services API interfaces will be available for download at this location: <http://www-306.ibm.com/software/awdtools/portfolio/support/>

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### Limitations

Limitations result from the fact that several interfaces, along with validation and security rules, are not implemented in the current release. For example, security roles cannot be set for resources in the **Resource Management** interface. Also, validation of range, type, or value of object properties and data fields is not implemented.

The following sections provide a summary of these limitations for each of the interfaces currently implemented in the Rational Portfolio Manager Web Services API.

#### Application Administration interface

The following table contains the limitations of the **Application Administration** interface.

*Table 6. List of limitations in the Application Administration interface*

Object	Limitation
ArchivedProject	Because of the dependency with objects not yet implemented in the <b>Work Management</b> interface, this API object cannot be used with this release.

Table 6. List of limitations in the Application Administration interface (continued)

Object	Limitation
AssetCategory AssetFinancialCategory AssetRTF AssetsDatafield AssetsRevisionImpact AssetsRevisionType AssetState	These API objects cannot be used with this release due to the dependency with objects not yet implemented in the <b>Assets Management</b> interface.
BenefitDatafield1 BenefitDatafield2 BenefitDatafieldLabelText BenefitLabelText	These API objects cannot be used with this release due to the dependency with objects not yet implemented in the <b>Financial</b> interface.
CapitalDatafield1 CapitalDatafield2 CapitalDatafieldLabelText CapitalLabelText	These API objects cannot be used with this release due to the dependency with objects not yet implemented in the <b>Financial</b> interface.
ChangeRequestRTF ChangeRequestState	These API objects cannot be used with this release due to the dependency with objects not yet implemented in the <b>Work Management</b> and <b>Documents</b> interfaces.
ChargeCodeStage	This API object cannot be used with this release due to the dependency with objects not yet implemented in the <b>Assets Management</b> and <b>Financial</b> interfaces.
ChargeType	This API object cannot be used with this release due to the dependency with objects not yet implemented in the <b>Assets Management</b> and <b>Financial</b> interfaces.
ClientRTF	
CommonScopeRTF	This API object cannot be used with this release due to the dependency with objects not yet implemented in the <b>Scope Management</b> interface.
CommonWBSRTF	This API object cannot be used with this release due to the dependency with objects not yet implemented in the <b>Work Management</b> interface.
ContractType	This API object cannot be used with this release due to the dependency with objects not yet implemented in the <b>Contract</b> interface.



Table 6. List of limitations in the Application Administration interface (continued)

Object	Limitation
Currency	This API object can be used only with the <b>Resource Management</b> interface in this release. It cannot be used with the <b>Work Management</b> interface for assignment to projects due to dependency with objects not yet implemented.
Datafield DatafieldRTF DatafieldState	Usage of these API objects is limited to <b>Resource Management</b> interface in this release due to the dependency with objects not yet implemented in the other interfaces.
DefectRTF DefectState	These API objects cannot be used with this release due to the dependency with objects not yet implemented in the <b>Scope Management</b> interface.
DeliverableRTF DeliverableState	These API objects cannot be used with this release due to the dependency with objects not yet implemented in the <b>Work Management</b> interface.
DocumentsDatafield DocumentRevisionType DocumentState	These API objects cannot be used with this release due to the dependency with objects not yet implemented in the <b>Documents</b> interface.
ExpenseCapitalCommonBenefitDatafield1 ExpenseCapitalCommonBenefitDatafield2 ExpenseCapitalCommonBenefitDatafield LabelText ExpenseDatafield1 ExpenseDatafield2 ExpenseDatafieldLabelText ExpenseLabelText	These API objects cannot be used with this release due to the dependency with objects not yet implemented in the <b>Financial</b> interface.
IssueRTF IssueState	These API objects cannot be used with this release due to the dependency with objects not yet implemented in the <b>Scope Management</b> interface.
MilestoneRTF	This API object cannot be used with this release due to the dependency with objects not yet implemented in the <b>Work Management</b> interface.
NoteMinutesRTF NoteState	These API objects cannot be used with this release due to the dependency with objects not yet implemented in the <b>Documents</b> interface.
PaymentType	This API object cannot be used with this release due to the dependency with objects not yet implemented in the <b>Financial</b> interface.

Table 6. List of limitations in the Application Administration interface (continued)

Object	Limitation
ProjectRTF	This API object cannot be used with this release due to the dependency with objects not yet implemented in the <b>Work Management</b> interface.
RequirementRevisionType RequirementRTF RequirementState	These API objects cannot be used with this release due to the dependency with objects not yet implemented in the <b>Scope Management</b> interface.
RevisionImpact	This API object cannot be used with this release due to the dependency with objects not yet implemented in the <b>Work Management</b> interface.
RiskRTF RiskState	These API objects cannot be used with this release due to the dependency with objects not yet implemented in the <b>Scope Management</b> interface.
ScheduleImpact	This API object cannot be used with this release due to the dependency with objects not yet implemented in the <b>Scope Management</b> interface.
ScopeElementsRevisionType	This API object cannot be used with this release due to the dependency with objects not yet implemented in the <b>Scope Management</b> interface.
ScorecardRevisionType ScorecardState	These API objects cannot be used with this release due to the dependency with objects not yet implemented in the <b>Scope Management</b> interface.
ServiceRequestRTF ServiceRequestState	These API objects cannot be used with this release due to the dependency with objects not yet implemented in the <b>Scope Management</b> interface.
State	This API object cannot be used with this release due to the dependency with objects not yet implemented in the <b>Work Management</b> interface.
SummaryTaskRTF TaskRTF TaskState	These API objects cannot be used with this release due to the dependency with objects not yet implemented in the <b>Work Management</b> interface.
WBSRevisionType	This API object cannot be used with this release due to the dependency with objects not yet implemented in the <b>Work Management</b> interface.
WorkProductRTF	This API object cannot be used with this release due to the dependency with objects not yet implemented in the <b>Work Management</b> interface.

## Resource Management interface

The following table contains the limitations of the **Resource Management** interface.

*Table 7. List of limitations in the Resource Management interface*

Object	Limitation
ResourceRoleAssignment	This API object cannot be used with this release due to dependency on objects not yet implemented in the <b>Security</b> handling module.
ResourceSecurityRights	This API object cannot be used with this release due to dependency on objects not yet implemented in the <b>Security</b> handling module.

## Client/Cost Center interface

The following table contains the limitations of the **Client/Cost Center** interface.

*Table 8. List of limitations in the Client/cost Center interface*

Object	Limitation
AbstractClient	attributeAssignments, documentFolder and RTF assignments cannot be made due to the fact that related objects are not yet implemented in this release.
ClientCostCenter	Assignment to project is not available in this release due to dependency on objects not yet implemented in the <b>Work Management</b> interface.
ClientCostCenterAssignment	Assignment of resource to client/cost center is not available in this release due to dependency on objects not yet implemented in the <b>Resource Management</b> interface.

## Other limitations

Security and validation rules are not yet implemented in this release of the Rational Portfolio Manager Web Services API.



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## Chapter 3. Status of change requests

This section explains the status of noteworthy problems in this release.

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### Known problems

This section describes known problems in this release of Rational Portfolio Manager.

#### **Inconsistency found while extending the project calendar forwards and backwards**

If you shift the start and finish dates of an effort with **Hours/Day** contour type to previous weeks, Rational Portfolio Manager will produce an **Insufficient Work/Effort available within a given period** error message. The workaround is to change the contour type to **ASAP**.

#### **PMR 00036 49R 000; Server locked up (copy calculated result + MSP export)**

When exporting projects to MSP or when copying calculated results, the server will be locked and no other activities can be done. The workaround is to send a notification to all resources notifying them of this activity.

#### **No error message is displayed when the PjC server is down**

When ProjectConsole server is down, no error message will be displayed in the **Chart Templates** tab of **Application Administration**. When trying to edit a chart or create a new one, the chart definition dialog is empty and doesn't contain any data. Contact your ProjectConsole server administrator.

#### **Metrics portlets in My Portal view**

When saving a layout in **My Portal** view under a new name, the chart template selection for any metrics portlets is lost. To fix this problem, after saving the layout under a new name, re-select the chart template to be used for each of your metrics portlets and save the layout.

#### **Invalid work contour upon setting/removing actuals in Timesheets view**

When setting or removing actuals in the **Timesheets** view, the contour in **Staffing** view shows wrong values.

#### **Click cancel after selecting a pivot from Resource Management will cause a loss of the menu buttons**

In the **Resource Management** view if you select any of the pivots, then cancel the operation from the **Select Date** dialog, the icons in the toolbar will be lost. The workaround is to close the **Pivots/Reports** view and reopen.

## Elements with workflow processes in progress cannot be deleted

Elements that have running workflow processes cannot be deleted. To be able to delete these elements:

1. Right click on the element and select **Communications** from the menu, then **Manage Workflows** from the second menu.
2. Select the running workflow process from the **Manage Workflow** dialog.
3. Click the **Cancel Selected** button.
4. Click the **Close** button to close the **Manage Workflow** dialog.
5. Select the element and delete.

## Workflow mandatory fields

When the description layout view is in check in mode, it can be closed without filling the mandatory fields. However, if the view is checked out, upon closing or checking in, the application warns you to fill the mandatory fields.

## Workflow element association set as default

In order to set an active workflow process as default in the **Workflow Element Association** portlet, first you need to mark the check box in the **Selected** column of that workflow.

## Steps created in workflow monitor

When creating a step in **Workflow Monitor** and deleting it afterwards, the deleted step remains in the **Workflow Design** view under the newly created step. The workaround is to drag and move the newly created step to see the old step under it, right click on the unwanted step and select **Delete** from the menu.


## Workflow adopt elements

In the **Adopt Elements** dialog of the **Outcome** tab of **Workflow Step Configuration**, if you expand the documents template and while the server is processing you click on the **WBS** or **Scope Management** buttons, Rational Portfolio Manager may produce an error message.

## Microsoft Project integration problem

Rational Portfolio Manager 6.2 provides a data exchange facility with Microsoft Project 2002 and 2003. However, for a successful integration, you need to make sure you have the latest drivers for Microsoft Jet and Microsoft Data Access Components (MDAC). You can obtain the MDAC 2.8 driver from Microsoft web site at: <http://www.microsoft.com/downloads/details.aspx?FamilyID=6c050fe3-c795-4b7d-b037-185d0506396c=en>

## Pivot tables display problem

In pivot tables, group summary values disappear if the position of last column is shorter than the width of the pane. The workaround is to hover on the right side of the column to get the  cursor, and drag all the way to the edge of the pane.

## Oracle Application Server

This issue is raised when you use Oracle Application Server OAS 10g with Oracle Database Server 9i. Due to the mismatch between the two (2) JDBC versions, Rational Portfolio Manager software does not operate properly, the workaround is

to replace classes12.jar, classes12.zip, and classes12dms.jar drivers in your Application Server located under \${OAS\_HOME}\jdbc\lib with the ones in your Database Server located under \${ORACLE\_HOME}\jdbc\lib.

## Problems fixed in this release

This section lists the problems fixed in this release of Rational Portfolio Manager.

*Table 9. Customer originated problems fixed in this release*

Problem ID	Description
PMR 50670 422 000; APAR #PK12368	Mail alert shouldn't be sent automatically, when team members enter time in timesheets.
PMR 68559 442 000; APAR #PK08828	Archived projects are visible in WBS view when filtering by attributes.
PMR 05176 122 000; APAR #IC47346	Deliverable pivots doubles costs (WBS), Estimated Remaining and Actual.
PMR 07784 122 000; APAR #PK13115	RPM6.1 Online Help: Database Errors and Warnings -300057 error is incorrect.
PMR 27175 999 000; APAR #PK07559	Cannot open default cost centre.
PMR 65170 999 000; APAR #IC46236	Add a function to remove Exec Access Level in the resource's Identification portlet.
PMR 37482 999 000; APAR #PK07469	Character limit on root deliverable and parent name columns in project deliverable detail pivot is set to 20.
PMR 37493 999 000; APAR #PK07470	Incorrect column name in General Health pivot.
PMR 33508 999 000; APAR #PK07597	Application Administration Security not correctly working.
PMR 33312 999 000; APAR #PK08676	Publish security problem: Published field not available in the identification portlet.
PMR 56914 999 000; APAR #PK11114	Cannot delete a Resource Attribute (Competency) in Application Administration, after it is no longer used in any projects.
PMR 36385 999 000	Actual hours are different between pivot and several views.
PMR 00045 49R 000	Delay problem when replacing profile with resource.
PMR 01324,49R,000; APAR #PK10130	Cannot adopt from template, unhandled error 4 or client crashes.
PMR 01720 49R 000; APAR #PK06855	Bubble Settings do not seem to be saved.
PMR 02719 999 000; APAR #PK05077	Adding calendar exceptions to the default system calendar causes -803 and -180 errors on a clean installation of database.
PMR 10100 49R 000	Buttons not displayed when using 120 DPI settings.
PMR 11706 49R 000; APAR #PK08039	My Work - Ready to Start/In Progress filter returns no result.
PMR 11768 49R 000; APAR #PK08434	Incorrect WS Baseline when baselining the project at the sub-element level.
PMR 12558 49R 000	Fix duration option for affected resource.
PMR 12563 49R 000; APAR #PK08228	Document Participant is not able to view the document.
PMR 12565 49R 000	Inconsistency in Scorecard description.

Table 9. Customer originated problems fixed in this release (continued)

Problem ID	Description
PMR 14908 49R 000; APAR #PK09409	Invalid Data in 'Multi-Attribute' band > 'Attribute Value' header in General Scope Element Pivot.
PMR 21782 49R 000; APAR #PK10089	%C is calculated incorrectly in Work Package when EETC is entered in the Timesheets view.
PMR 22151 49R 000; APAR #PK10342	Work contours are changed after exporting RPM project to MSP 2003.
PMR 24640 49R 000; APAR #PK11162	Investment Maps Settings cannot be saved when a scorecard option under Average Scorecard Rating % is selected.
PMR 26356 49R 000; APAR #JR20156	Document move will update 'Last Checked Out By' and 'Updated By' fields.
PMR 27653 49R 000	Calculate gives circular dependency error message.
PMR 29196 49R 000; APAR #IC40677	ESE import fails with forward slash "/" in the project name.
PMR 40244 999 000; APAR #PK08541	Different rights on project when accessing bubble chart from different views.
PMR 50832 49R 000; APAR #PK15783	New reports uploaded remove user's custom reports.
PMR 67062 49R 000	Insufficient work in Timesheet.
PMR 6838 49R 000	Show button is not working correctly.
PMR 69362 49R 000; APAR #PK00098	ESE Import fails on RPM 6.1.
PMR 79373 49R 000; APAR #PK07484	EINVAL operation error in Notes/meeting.
PMR 87903 49R 000	Unavailability of help icon in print preview.
PMR 87990 49R 000; APAR #PK07586	Incorrect Subset Pools message.
PMR 88652 49R 000	Windows Logoff conflict with RPM.
PMR 88655 49R 000	Online Help window stays on top of all other windows.
PMR 88741 49R 000	Changing Intranet Password results in 10009 error.
PMR 88793 49R 000; APAR #PK04732	RPM 6.1.1.1 missing bars in print mode.
PMR 88924 49R 000; APAR #PK04965	Inconsistent search function in report page.
PMR 89663 49R 000	Imported information not displayed correctly for task.
PMR 05952 999 000; APAR #PK07497	Cannot run timesheet report in the Resource Management view.
PMR 16963 999 000; APAR #PK07592	Performance: the Resource Management view is slow.
PMR 19635 999 000	Rank and Priority needed to be reworded as priority.
PMR 30497 000 00	FormFloat Error: Running Timesheet Detail by Project Report.
PMR 44021 999 000; APAR #PK10727	Evariant error: Running Multiple Projects on General Health Pivot.
PMR 56099 999 000; APAR #PK10521	Script to make resources in-synch with system security resources.



Table 9. Customer originated problems fixed in this release (continued)

Problem ID	Description
PMR 37467 999 000	-9999 error message after entering actual dates on a duration based task. Roll up is wrong afterwards.
PMR 40916 999 000; APAR #PK08107	-9999 error message when invoice name is long.
PMR 44244 999 000; APAR #PK09888	Many fields in WBS Attribute Report Template return no values.
PMR 00274 SGC 848; APAR #PK07765	Verify not saving.
PMR 03439 999 000	About the error message "EAccessViolation".
PMR 15171 999 000; APAR #PK04249	The last task duration shrinks to 1 day by using "Quick Create" icon.
PMR 28761 999 000; APAR #PK05100	Document name is replaced by the physical file name even though the user specify the document name.
PMR 28808 999 000; APAR #PK05107	Problem with "Auto Nodes Expand" and "Expanded Select" functions.
PMR 29467 999 000; APAR #PK05086	Successor in inter-Project dependency doesn't show correctly in.
PMR 76304 101 616	Duration base task shouldn't allow a project manager to assign 'Work' assignment to assigned resource in Resource portlet.
PMR 76439 101 616	MSP 2003 Project start date roll up incorrectly and duration shrinks after exporting a project.
PMR 78082 101 616	Strange behavior after calculation/level without checking.
PMR 77067 101 616; APAR #PK10412	Moving multiple documents doesn't work.
PMR 00026 SGC 848	Timesheets using Tab key skips Wednesday and Thursday.
PMR 00498 SGC 848; APAR #PK15490	Calendar records in resource pivots are missing.
PMR 16484 999 000	Timesheets notes info not displayed in Assign by Project filter.
PMR 37468 999 000; APAR #PK10522; PMR 04183 999; APAR #PK10524	Multi-select and single-select attributes in pivots.
PMR 42334 999 000; APAR #PK08889	Application locks when saving a report to PDF.
PMR 55307 999 000; APAR #PK12252	Report graph showing 0,1,2,3,4,5 but not attribute value.
PMR 55340 999 000; APAR #PK12174	Extra space in service request name in CSV export.
PMR 56592 999 000; APAR #PK11730	Report will create an extra page.
PMR 57718 999 000; APAR #PK11313	Staffing view search by Pools inaccurately pulls up wrong data.
PMR 57792 999 000; APAR #PK11488	Templates for Scope Exceptions don't carry over Charge Codes.

*Table 9. Customer originated problems fixed in this release (continued)*

<b>Problem ID</b>	<b>Description</b>
PMR 59250 999 000; APAR #PK12193; PMR 59522 999 000; APAR #PK12159	The Closed Date field doesn't get populated when closing the SR task in WBS view or closing SR by completing a workflow.
PMR 65645 999 000; APAR #PK12753	Monthly Resource Utilization pivot does not show details.
PMR 67307 999 000; APAR #PK13565	Templated Scope management updates the Estimate Date to the templated value.

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## Chapter 4. Contacting IBM Customer Support for Rational software products

If you have questions about installing, using, or maintaining this product, contact IBM Customer Support as follows:

The IBM Software Support Internet site provides you with self-help resources and electronic problem submission. The IBM Software Support home page for Rational products can be found at <http://www.ibm.com/software/rational/support/>.

Voice Support is available to all current contract holders by dialing a telephone number in your country (where available). For specific country phone number, go to <http://www.ibm.com/planetwide/>.

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- Your operating system, version number, and any service packs or patches you have applied
- Your database, version number, and any service packs or patches you have applied
- Your application server, version number, and any service packs or patches you have applied
- Product name and release number
- Your PMR number (if you are following up on a previously reported problem)



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Printed in USA

GI11-6353-00

