Rational. Portfolio Manager

Version 6.2.1.1
Windows, UNIX, Linux

Release Notes

Rational® Portfolio Manager

Version 6.2.1.1
Windows, UNIX, Linux

Release Notes

Before using this information, be sure to read the general information under “Notices,” on page 9.

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About this book

This document outlines Rational Portfolio Manager 6.2.1.1 release notes. It covers new features added in this release, a list of known problems, and problems that have been fixed in this release.

Who should read this book

This document is intended for any Rational Portfolio Manager user.

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Chapter 1. About this release

Migrating to this version

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

Customer change requests implemented in 6.2.1.1

This section describes the customer change requests implemented in version 6.2.1.1 of Rational Portfolio Manager.

Affected hours included in monthly resource pivots; PMR 37491 999 000; APAR PK07471

A series of headers are included under **Utilization (h)** band of **Monthly Resource Utilization** pivot to show the affected related data. The headers include:

- Assigned
- Assigned MM (My Month)
- Available Planned Affected
- Available Proposed Affected
- Available (Assigned + Affected) MM
- Planned Affected Total
- Proposed Affected Total

All assigned resources in General Health pivot; PMR 37491 999 000; APAR PK07471

All assigned resources will be displayed in the **Resources** header of the **Reference** band in **General Health** pivot. The resources' names are separated by a semicolon.

Note: The maximum limit of this header is 2048 bytes. If the resources' names exceed this limit, the names will be truncated.

Grand totals in pivots; PMR 37598 999 000; APAR PK07493

All grand total amounts are displayed in the footer area of the pivot tables.

Headers renamed in Monthly Resource Utilization pivot; PMR 37606 999 000

The following table describes the new header names in **Monthly Resource Utilization** pivot:

Table 1. Header names in Monthly Resource Utilization pivot

Band	Previous Header Name	New Header Name
Utilization (h)	Baseline (L)	Project Scheduled Work (Week)
	Baseline (L) MM	Project Scheduled Work (Week) MM

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Table 1. Header names in Monthly Resource Utilization pivot (continued)

Band	Previous Header Name	New Header Name
Project Work/Effort (WBS)	Cum. Baseline (L) before selected start date	Project Scheduled Work (Cumulative)
	YTD Baseline (Latest)	Project Scheduled Work (YTD)
Task Work/Effort	Cum. Baseline (L) before selected start date	Task Scheduled Work (Cumulative)
	YTD Baseline (Latest)	Task Scheduled Work (YTD)
Assignment Work/Effort	Cum. Baseline (L) before selected start date	Assigned Work (Cumulative)
	YTD Baseline (Latest)	Assigned Work (YTD)

Expanding and saving pivot layouts at a given level; PMR 37625 999 000; APAR PK07515

Pivot tables can be expanded by right clicking on the group header and choosing **Expand to here** from the menu. The expanded layout can be saved by typing a name in the **Name** field and clicking the **Save** button.

MM calculation formula; PMR 37631 999 000; APAR PK07510

The MM calculation uses the following formula:

```
AVAILABILITY(MM) = ( AVAILABILITY(H) - ASSIGNED(H) ) / AVAILABILITY(H)
```

Selecting multiple resources in the Resource Management view; PMR 39176 999 000; APAR PK07479

It is now possible to select multiple resources from different pools in the **Resource Management** view. This is useful when running reports or pivots on multiple resources.

Monthly Resource Utilization pivot in Resource Management view; PMR 39186 999 000; APAR PK07481

The **Monthly Resource Utilization** pivot is now available from the **Resource Management** view.

Bands and headers visible on every print page; PMR 37515 999 000

Show bands and headers on every page is set to **ON** by default in the **Print Preview**, **Report Designer**, **Behavior** tab.

Export to CSV; PMR 38333 999 000; APAR PK07461

To export only the visible pivot data click on the **Save as visible** icon. This is convenient for users who don't want to save all the pivot data in CSV format.

Changing cost labor types when actuals exist; PMR 38335 999 000; APAR PK07462

A new setting is added in the **Financials** tab of **Application Administration** that lets you set the default assignment type to **Capital** or **Expense**.

Moving multiple projects into portfolios; PMR 37530 999 000; APAR PK07475

It is now possible to move multiple projects into portfolios. To do this **Shift** or **Ctrl** select multiple projects and drag and drop them into a portfolio. Click **Yes** to confirm the move.

New cross charge parameter; PMR 35831 999 000

A new setting is added in the **Financials** tab of **Application Administration** that lets you use the resource cost center for new assignments.

Organizational info populated in pivots and reports; PMR 37488 999 000

A new setting is added in the **General** tab of **Application Administration** that lets you set the resource information mapping. With this set to **Link to Organization Structure** you will be able to map employee information (company, division, and department) that can be viewed in pivots and reports.

The business rule for mapping employee information is as follows:

1. The name of the lowest element in the organizational structure with **Department** type will be mapped to employee's **Department** code.
2. The name of the lowest element in the organizational structure with **Group** type will be mapped to employee's **Division** code.
3. The name of the lowest element in the organizational structure with **Organization** type will be mapped to employee's **Company** code.

Note: This option can be set only once in Application Administration of a new Rational Portfolio Manager installation. After active resources are created in the database, this option cannot be changed.

Customizing Schedule Dates portlet; PMR 85825 999 000

It is now possible to customize the **Schedule Dates** portlet to let you display or to remove columns.

Export to CSV the pivots that include group headers; PMR 37651 999 000; APAR PK07477

When exporting pivots with grouped columns to CSV, the grouped information is visible in the grid.

Month column in Timesheet pivot; PMR 35822 999 000

The **Month** column is added in the **Timesheet** pivot so that the timesheet figures can be rolled up by month.

Chapter 2. Status of change requests

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

Known problems

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

RPM Ref #: 35720; Actions and Processes are not triggered after monitors are finished

In the **Outcome** tab of the workflow process if you have conditions like **Go to Steps** or **Start Process** you cannot add any **Monitors**. The workaround is to add an extra step between the two steps that you have and assign the conditions for that step in the **Monitors** dialog.

Problems fixed in this release

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

Table 2. Customer originated problems fixed in this release

Problem ID	Description
PMR 37482 999 000; APAR PK07469	Character limit on root deliverable and parent name columns in the **Project Deliverable Detail** pivot.
PMR 39190 999 000; APAR PK07492	**Monthly Resource Utilization** pivot pulled via the **Portfolio Dashboard** returns no data.
PMR 66354 999 000; APAR PK13049	Dead plus sign expanding portfolios.
PMR 37527 999 000; APAR PK07508	Pivot ″From″ and ″To″ date logic.
PMR 37500 999 000; APAR PK07473	Inherit system security settings after changes have been made.

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Chapter 3. 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/.

Note: When you contact IBM Customer Support, please be prepared to supply the following information:

- Your name, company name, ICN number, telephone number, and e-mail address
- 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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