

Version 7.0.3.3
Windows, UNIX



Release Notes

Version 7.0.3.3
Windows, UNIX



Release Notes

Before using this information, be sure to read the general information under "Notices," on page 39.

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About this book

This document outlines Rational Portfolio Manager 7.0.3.3 release notes. It covers migration procedures, 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 and database or system administrators responsible for Rational Portfolio Manager upgrades.

Proprietary notice

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Chapter 1. About this release

Documentation updates

There is an updated version of the Rational® Portfolio Manager Web Services API guide and the Rational Portfolio Manager/ClearQuest version 7.0.2.2 integration guide included in this release. (The instructions in the ClearQuest® integration guide for 7.0.2.2 is current for Rational Portfolio Manager 7.0.3.3) All updated documents are available as part of product installation media, or from the IBM® Publications Center.

To locate the publications center for your area, go to <http://www.ibm.com> and search on the term **Publications center**. Follow the instructions at your Publications Center site to locate individual documents.

Security settings changes

This section describes the new/modified security settings in version 7.0.3.3 of Rational Portfolio Manager.

New security rights for the Financials portlet

New security rights have been added to the Financials portlet. Having these security rights enables resources to edit **Estimates**, **ETC**, and **Actual** columns in Expense, Capital, Benefits, and Time-Phased tabs at the project, deliverable, task, and all scope element levels.

Note: By default, these rights are not granted for any of the role-based security levels. If you do not enable these setting after migrating to 7.0.3.3, users that were previously capable of editing Estimates, ETC, and Actuals will no longer to perform these actions. Administrators should grant these role-based security rights according to the organization's security policy.

To enable these security rights:

1. Select Application Administration from the navigation bar. (administrator security rights required)
2. Select the Security tab.
3. Select the WBS sub-tab.
4. Expand the required project, deliverable, task, or any scope elements groups.
5. Select the required role-based security levels.
6. In the right window expand **Budget/Cost/Revenue**.
7. Expand **Financials**.
8. Expand **Expense/Capital** and **Benefits**.
9. Mark the check boxes for **Edit Estimate/ETC** and **Edit Actual**.

Note: If a resource has Project Manager role-based security rights and in the **Scope Elements** section **All Permissions Granted** is selected, this resource has security rights to edit the Financials portlet of scope elements, regardless of the security rights set in the scope elements group role-based security.

Editing and updating scorecards security rights

There are two new security rights added in the Security section of the Application Administration that allow administrators to update and edit available scorecards. To grant these security rights:

1. Select Application Administration from the navigation bar. (administrator security right required)
2. Select the Security tab.
3. Select the Default Security/Settings sub-tab.
4. In the top right window expand **Application Administration**.
5. Expand **Scorecards**.
6. Mark the check boxes for **Edit Scorecards** and **Update Scorecards**.

Latest supported operating environments

The following tables list the latest Rational Portfolio Manager supported operating environments:

Table 1. Rational Portfolio Manager Supported Databases

Database	Version	OS	Hardware Architecture
DB2®	8.2*	Windows® 2000 FP 4	Xeon™, Itanium® 2
DB2	8.2	Windows 2003	Xeon, Itanium 2
DB2	8.2	AIX® 5.3	P5
DB2	8.2	AIX 5.3 (64 Bit)	P5
DB2	8.2	RedHat Linux® AS Version 3	Xeon
DB2	8.2	SuSE Linux 9.2	Xeon
Oracle	V 9.2.0.1	Windows 2000	Xeon, Itanium 2
Oracle	V 9.2.0.1	Windows 2003	Xeon, Itanium 2
Oracle	V 9.2.0.1	AIX 5.3	P5
Oracle	V 9.2.0.1	Windows 2003	Xeon, Itanium 2
Oracle	V 9.2.0.1	HP-UX B.11	HP PA-RISC
Oracle	V 9.2.0.7	RedHat Linux AS Version 3	Xeon
Oracle	V 9.2.0.7	SuSE Linux v9.2	Xeon
Oracle	V 9.2.0.7	Solaris 2.9 (64 Bit)	SPARC
Oracle	10.2.0.1	Windows 2000 FP 4	Xeon, Itanium 2
Oracle	10.2.0.1	Windows 2003	Xeon, Itanium 2
Oracle	10.1.0.5	AIX 5.3	P5
Oracle	10.1.0.5	AIX 5.3 (64 Bit)	P5
Oracle	10.2.0.1	RedHat Linux AS Version 3	Xeon
Oracle	10.2.0.1	RedHat Linux AS Version 3 (64 Bit)	Xeon
Oracle	10.2.0.1	SuSE Linux v9.2	Xeon

* Latest DB2 Fix Pack certified is 13 for Windows and AIX, while it is 12 for Linux.

Table 2. Rational Portfolio Manager Supported Application Servers

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 3. Rational Portfolio Manager Supported Application Servers for Web Services API

Application Server	Version
WebSphere	V 5.1 and 6.0
Apache Tomcat	V 5.0
WebLogic	V 8.1.5
Oracle Application Server	V 9.0.4 and 10.1.0.2

Customer change requests implemented in 7.0.3.3

This section describes the customer change requests implemented in version 7.0.3.3 of Rational Portfolio Manager.

PMR# 00383 SGC 848; Grouping the archived projects

The Archived Projects tab in Application Administration allows you to create folders that can be used to organize (for example, to identify business units or entities) where the archived data belongs. To use this feature:

1. Select the Application Administration navigation bar. (administration security rights required)
2. Select the Archived Projects tab.
3. Drag the **Folder** icon from the toolbar and drop it on the root folder.

Note: Folders can only be created and nested under the root folder. Creation of folders at the root or under the archived projects is not allowed.

4. Name the folder.
5. Drag and drop the required archived projects into the newly created folder.

Session timeout

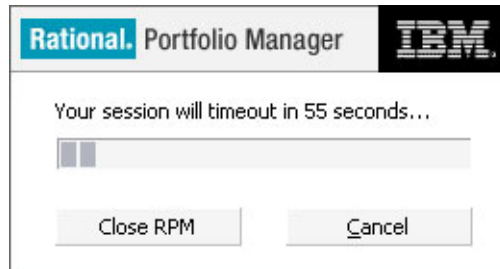
The session timeout will end the current Rational Portfolio Manager client session, if idle, for the amount of time specified in the Application Administration. To set the session timeout:

1. Select Application Administration from the navigation bar. (administrator security rights required)
2. Select the General tab.
3. Click the down arrow in the **Session timeout (minutes)** field and select a value from the list. The choices are: 0, 30, 60, 90, 120, 180, 240, 300, and 360 minutes.

Note: The default value set for session timeout is zero (0). Setting the value to zero (0) never times out the client session.

4. Select the **Force Check-In on timeout** radio button to check in all the checked out elements when the session times out, or select the **Force Undo Check-Out on timeout** radio button to undo any previously checked out elements when the session times out.

When the session times out, Rational Portfolio Manager displays the following dialog:



After sixty (60) seconds, Rational Portfolio Manager client will close. Clicking the **Cancel** button cancels the operation and clicking the **Close RPM** button will close the Rational Portfolio Manager client.

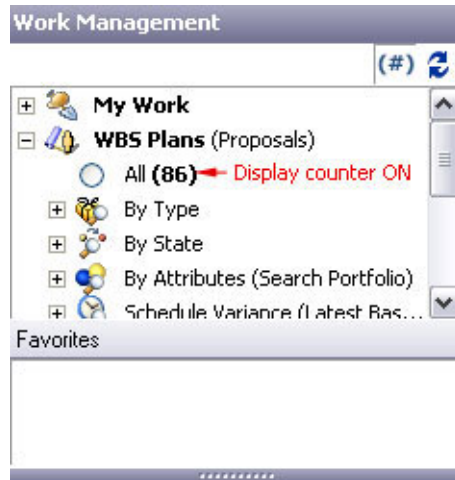
Turning off the filter counters to improve performance

The counters in the filter area of the Work Management, Scope Management, and Documents views can be turned off to improve performance. When the counter is set to off, at login or when a view with display counter is opened, the Rational Portfolio Manager client doesn't make a call to the server to return values for these counters and improves loading time for these views. The default value for displaying the counter is set in the Application Administration. To set the value for the counter:

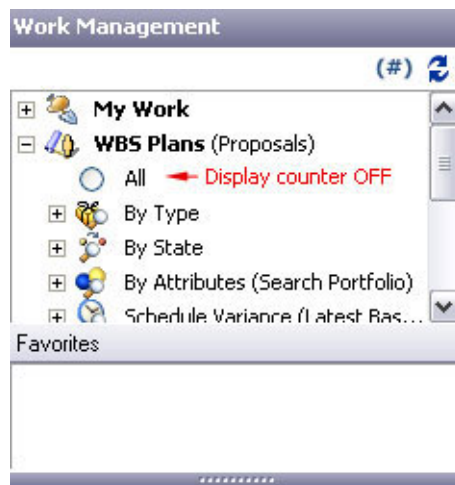
1. Select Application Administration from the navigation bar. (administrator security rights required)
2. Select the General tab.
3. From the **System Defaults** group click the down arrow in the **Filter Counters** field.
4. Select **Disabled**, **Default ON**, or **Default OFF** from the list.

To turn on or off the display counter in the filter area:

1. Select Work Management, Scope Management, or Documents from the navigation bar.
2. Click the Display Counter icon (**(#)**) to display the counters.



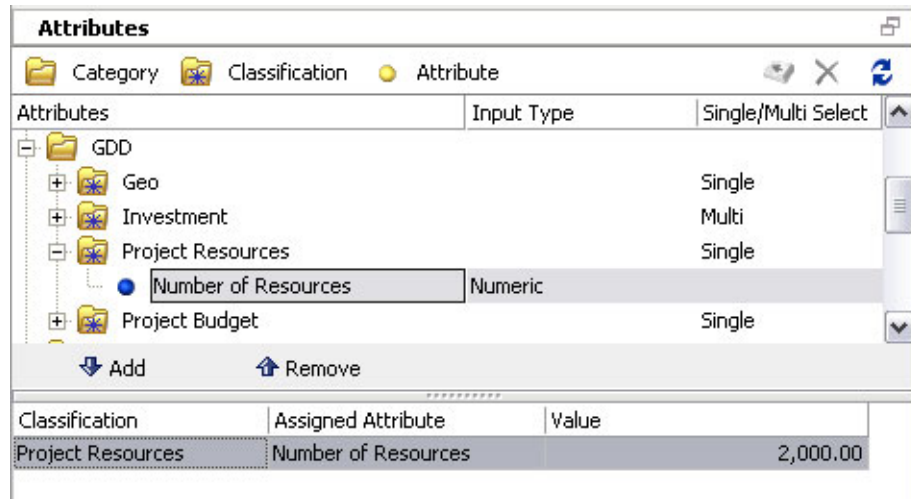
3. Click the Display Counter icon ((#)) again to remove the counters.



PMR# 93470 033 724; Numerical attribute values in investment maps


This new feature allows you to configure your projects investment maps to show numerical attribute values. This is useful to group your projects by attribute values. Some examples of project attributes are number of resources used in the project, project cost, or project revenue. To assign attribute values to your projects:

1. Select Work Management from the navigation bar.
2. Select a project and click the **Description** icon from the toolbar.
3. Expand the **Attributes** portlet.
4. Select a numeric attribute from the top frame and click **Add** to add the attribute to the bottom frame.
5. Enter a value for this attribute in the **Value** column.



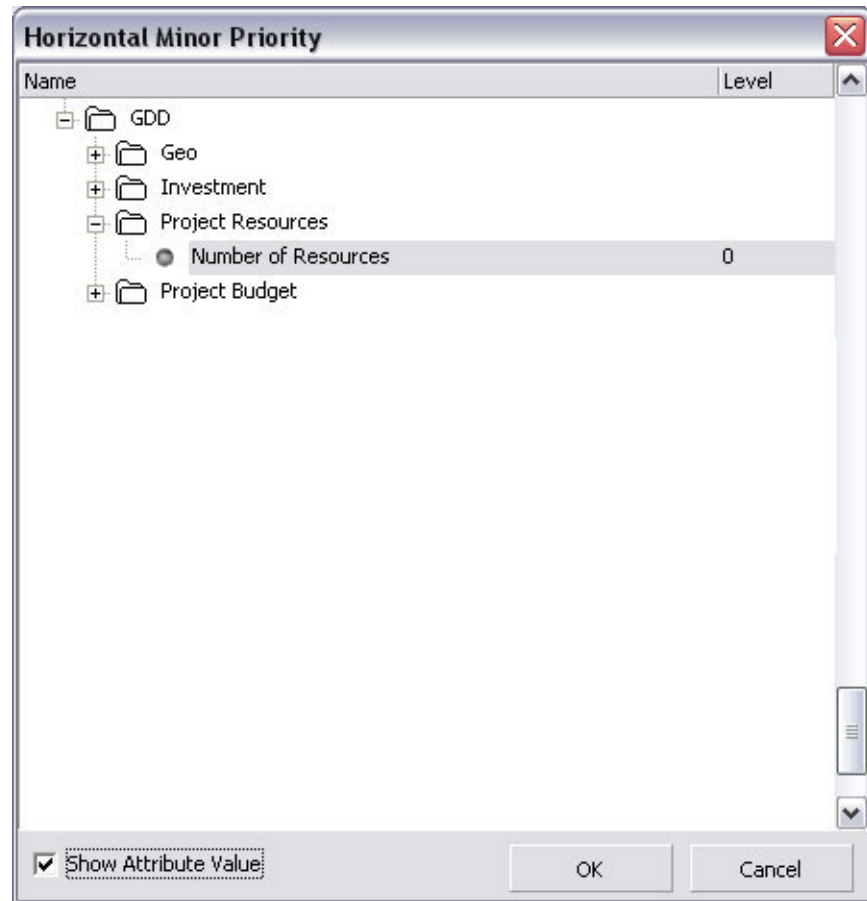
6. Continue assigning the same attribute for other projects and enter values in the **Value** column.

To configure the investment map to show numeric attributes for your projects:

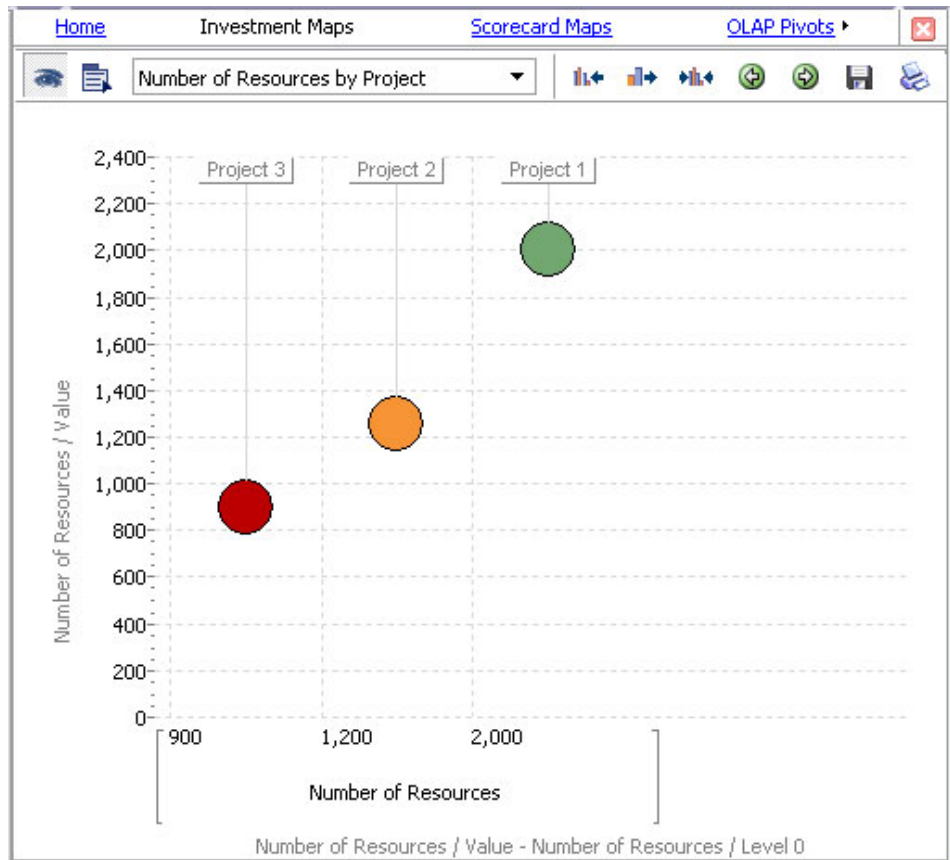
1. In the Work Management view select the projects that you've assigned the attribute in the previous steps.
2. Click the **Portfolio** icon from the toolbar.
3. Select the **Investment Maps** icon in the Portfolio Dashboard view.
4. Select the **Settings** icon () to open the Settings dialog.
5. Expand the **Dimension** category.
6. In the **Selection** column for the **Vertical Axis** click the down arrow to open the Vertical Axis dialog.
7. Select the attribute that you've assigned to the project from the list.

Note: Since the attribute value is required for the vertical axis, the **Show Attribute Value** option is disabled.

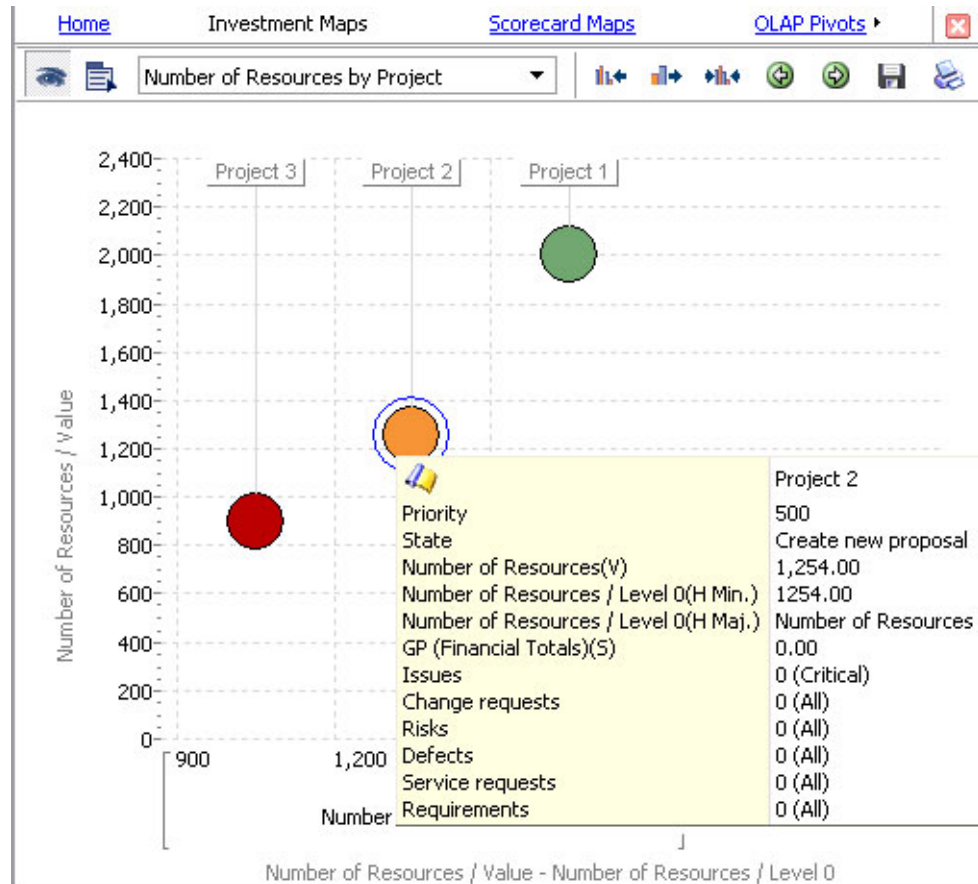
8. Click **OK** to accept the setting and close the Vertical Axis dialog.
9. You can optionally select the same attribute for the **Horizontal Minor Priority** and **Horizontal Major Priority**.



10. Marking the check box of **Show Attribute Value** displays the attribute value, leaving it unchecked displays the attribute name.
11. Name the investment map.
12. Click **Apply** and **Close**.



Note: The values used in the vertical and horizontal axes are rounded numbers. The actual values are displayed in the bubble tooltip.



PMR# 92967 033 724; 93469 033 724; Updating scorecards

This new feature allows administrators to update information for a scorecard in the Application Administration view and propagate the changes to any WBS, scope, resource, or asset elements using that scorecard.

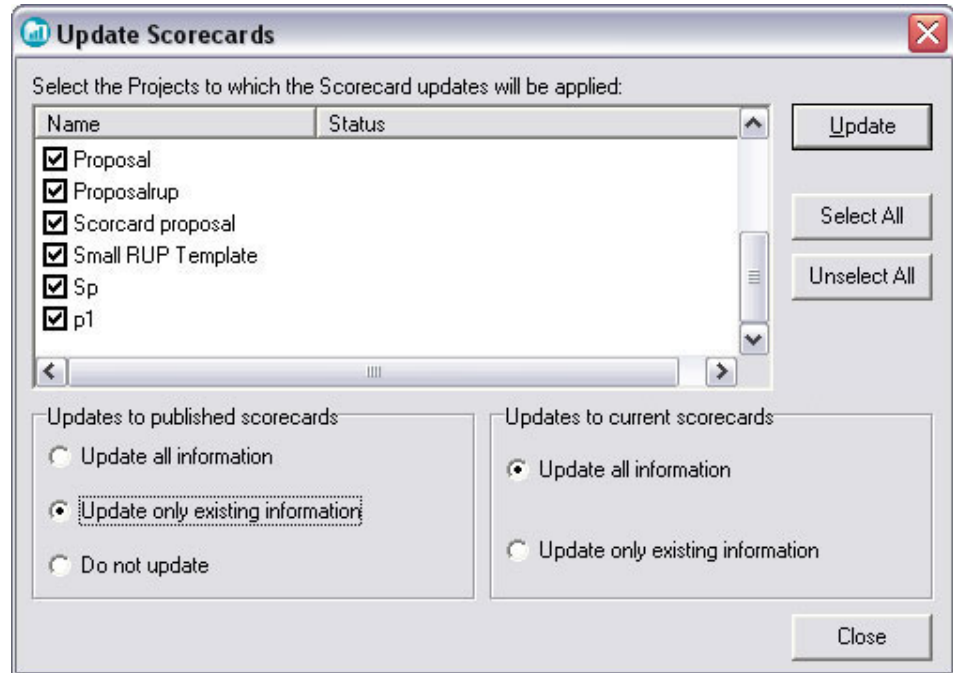
Updating edited scorecards

Scorecards that have been edited (for example, new questions or responses are added or removed, the weight of the scorecard is changed, etc.) can be updated from the Application Administration view. This ensures that all elements using that scorecard are updated across the repository. To update a scorecard:

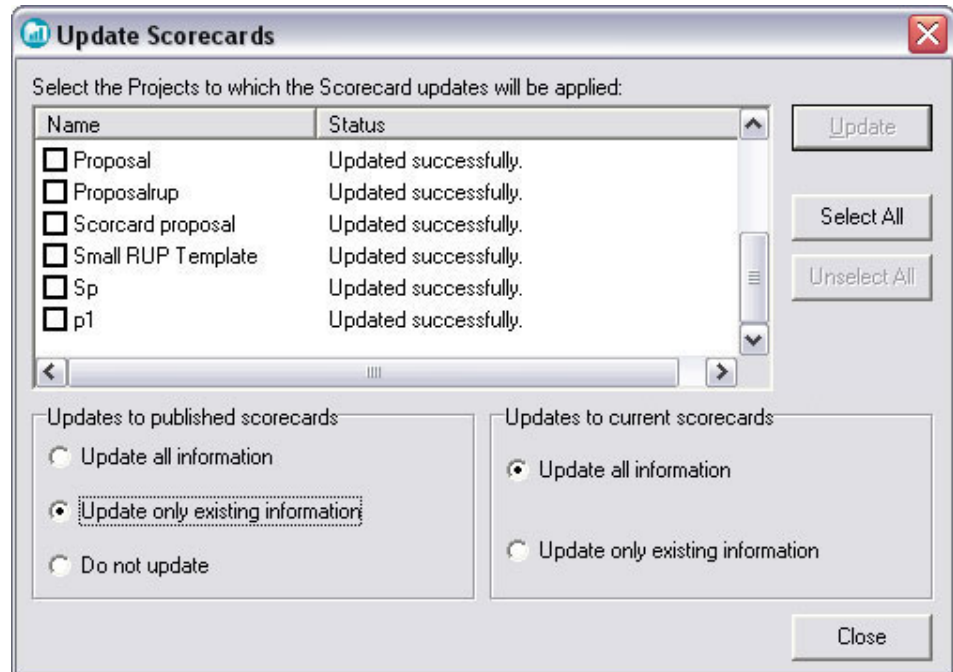
1. Log in to Rational Portfolio Manager as an administrator with edit and update scorecards security rights granted.
2. Select the Scorecards tab.
3. Select the WBS, Scope Management, Resources, or Assets sub-tabs in which you want to update the scorecard.
4. Expand the scorecard folder and edit the scorecard as required.
5. Right click on the scorecard and select **Update** from the context sensitive menu.

Note: Update menu option is only available if you right click on the scorecard. This option is not available in the questions, responses, categories, or folders context menus.

6. The Update Scorecards dialog is displayed with the list of all elements using the selected scorecard:



7. Select the required elements that you want to update the scorecard. Clicking the **Select All** button selects all elements.
8. In the **Updates to published scorecards** (published scorecards associated to elements) and **Updates to current scorecards** (scorecards associated to elements but not published) sections select:
 - **Update all information:** All information from the original scorecard will be mirrored in the scorecards being processed. New questions/categories will be added, items that were removed from the original scorecard will be removed. Any new responses to existing questions will be added. All information in existing categories, questions, responses will be updated. Current responses will be retained and weights will be reapplied to existing responses.
 - **Update only existing information:** Any new questions/categories to the scorecard will not be added to the scorecards being processed. Questions/categories that were removed from the original scorecard will be removed. Any new responses to existing questions will be added. All information in existing categories, questions, responses will be updated. Current responses will be retained and weights will be reapplied to existing responses.
 - **Do not update:** No updates will be performed to the scorecards.
9. Click the **Update** button.
10. The system processes the update and after a few seconds (depending on the number of elements selected) an **Updated Successfully** message is displayed in the **Status** column.



Workflow history to display branched workflow processes and adopted elements

There is a new tab in the Workflow History dialog that displays all branched workflow processes and adopted elements of any steps. To view the workflow history:

1. Right click on any element that has a running workflow process.
2. Select **History** from the context menu.
3. The workflow history dialog is displayed.
4. Select the Process tab.
5. Select a workflow process from the top left window.
6. Click on any steps in the top right window.
7. Select the Process tab in the bottom window to see all processes done for that step.

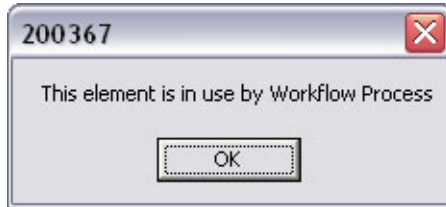
%W in General Health pivot

The %W column is added to the General Health pivot that displays the percent of work spent on the projects.

Workflow locking

When all users of a workflow step submit vote or checklist, or conditional branching step is processing, Rational Portfolio Manager workflow element will be locked to prevent other users from modifying information of this element. If this element is already checked out by other users, workflow step will be pending and continues processing once the element is checked in.

When Rational Portfolio Manager element is locked by a workflow process and other users try to check out the element, the following message is displayed:



After workflow step completes, it will unlock the element.

Blocking external actions

When workflow step locks an element, workflow step with blocking external actions will keep the element locked until the external action is completed. However, workflow step with non-blocking external actions will unlock the element when it runs the external action.

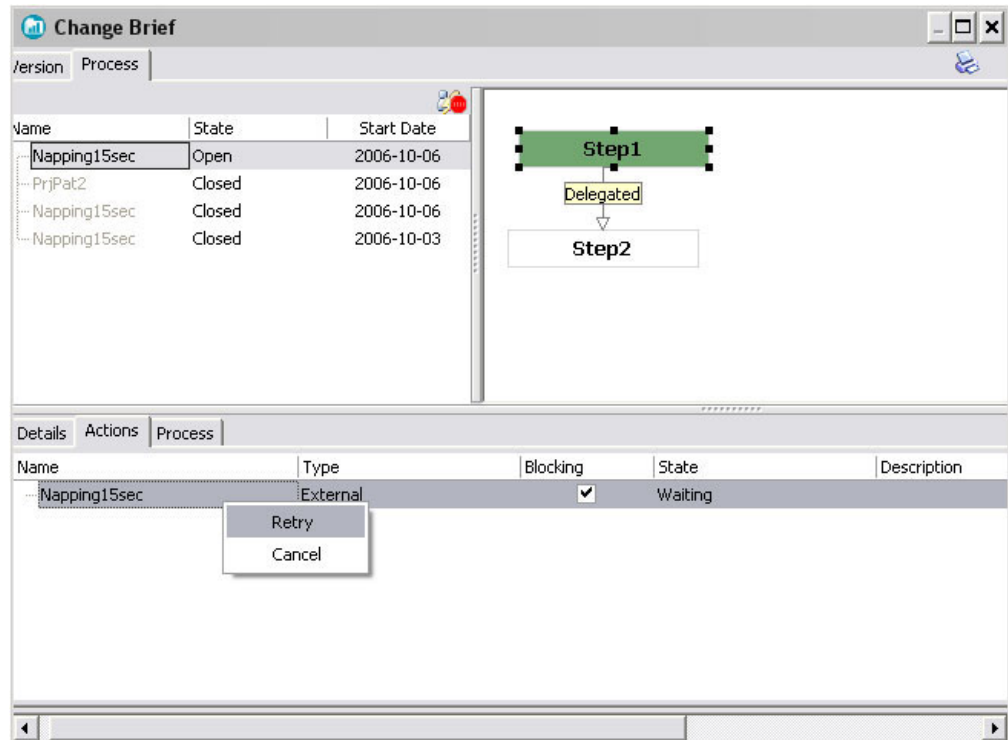
To specify an external action as blocking:

1. Select Application Administration from the navigation bar.
2. Select the External Actions tab.
3. Mark the check boxes for external actions in the **Blocking** column.

Category		Action		
Name	Type	Path	Blocking	
Simon Legault			<input type="checkbox"/>	
Empty	Web Service	http://pmoent96.mtllab...	<input checked="" type="checkbox"/>	
RpmSave	Web Service	http://pmoent96.mtllab...	<input checked="" type="checkbox"/>	
RpmApi	Web Service	http://pmoent96.mtllab...	<input checked="" type="checkbox"/>	
Sleeping2min	Web Service	http://pmoent96.mtllab...	<input checked="" type="checkbox"/>	
Napping15sec	Web Service	http://pmoent96.mtllab...	<input checked="" type="checkbox"/>	
Failing	Web Service	http://pmoent96.mtllab...	<input checked="" type="checkbox"/>	
RpmWorkflow	Web Service	http://pmoent96.mtllab...	<input checked="" type="checkbox"/>	
RpmSleepAndSave	Web Service	http://pmoent96.mtllab...	<input checked="" type="checkbox"/>	
Sleeping2minNB	Web Service	http://pmoent96.mtllab...	<input type="checkbox"/>	

In the element workflow history view, you can see the status of all external actions triggered by workflow. For the external actions that don't succeed, you can retry or cancel the action using the right click menu. To view the workflow history of an element running a workflow process:

1. Right click on the element and select **History** from the menu.
2. Select the Process tab.
3. Select the Actions tab from the bottom frame. The status of all external actions triggered by a workflow is listed.
4. If the external action is not succeeded, a right click menu allows you to cancel or retry the action.



Ability to calculate MM (Man Month) for profiles in the Resource Supply and Demand pivot


To calculate the MM (Man Month) columns of the Resource Supply and Demand pivot for profiles, the default project calendar is used. The formula for MM value columns is the corresponding column divided by the profile availability per month based on the project default calendar.



Supply/Demand by Year		Calendar (h) (Sum)	Proposed (h) (Sum)	Proposed MM (Sum)
Name				
rup_system_analysis_adm		176.0 h	40.0 h	0.23
2006		176.0 h	40.0 h	0.23
Profile		0.0 h	40.0 h	0.23
rup_system_analysis_adm, ...		0.0 h	40.0 h	0.23
Resource		176.0 h	0.0 h	0.00

In the above example the Proposed (h) (Sum) was divided by Calendar (h) (Sum) to get the Proposed MM (Sum) value.

Reserving workflow processes for modifications

This feature allows workflow designers to reserve the workflow processes while in designing mode. This ensures the integrity of the information, and is required in an enterprise solution where multiple resources potentially can be updating the same workflow process. To use this feature:



1. Select the Workflow Design  from the navigation bar.
2. Expand the element to the required workflow process.
3. Double click the process to open the Design view.

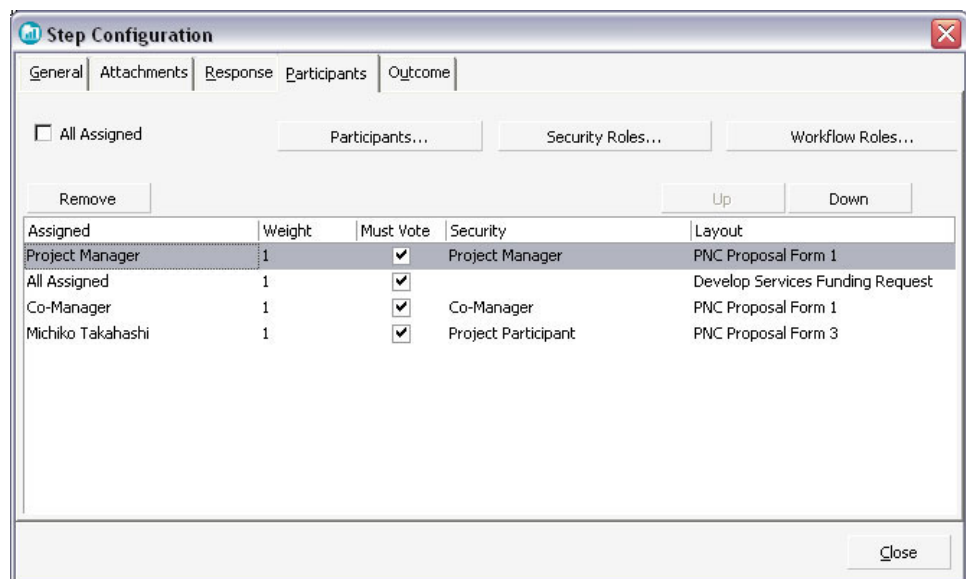
4. Select the Reserve icon () to be able to modify the workflow process.
5. Select the Release icon () after the modification has been made.


Note: Closing the Design view places the workflow process in the Release mode.

Prioritizing workflow role mapping

In some cases the same resource can have two or more workflow roles with different security and layout assigned in the Participants tab of the workflow process Step Configuration dialog. In this case the first assignee in the list has the priority and his/her security and layout will be used when responding to a workflow step. To change the priority:

1. Select the Workflow Design () from the navigation bar.
2. Expand the element to the required workflow process.
3. Double click the process to open the Design view.
4. Click the Reserve icon ().
5. Double click on a step to open the Step Configuration dialog, or right click on the step and select **Open Configuration** from the context menu.
6. Select the Participants tab.
7. Use the **Up** and **Down** buttons to reorder the list.



8. Click **Close** to close the dialog.
9. Click the Release icon () to check in your modifications.

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.

PMR# 01004 999 655; 16365 999 000; Attributes columns in the Timephased Budgets pivot

The Attributes columns in the Timephased Budgets pivot are missing. There is no workaround for this issue in this release.

Attributes columns in the Finance Assessment pivot

The Finance Assessment pivot doesn't correctly display the multi-attributes columns. There is no workaround for this issue in this release.

Weekly Resource Utilization pivot is missing one week

The Weekly Resource Utilization pivot displays only four (4) weeks for the given month. This results in missing data for the first week of the month. There is no workaround for this issue in this release.

Microsoft .NET version 1.1 limitations

Due to limitations in Microsoft® .Net version 1.1, customers should be aware that integrations built using the Rational Portfolio Manager Web Services API will likely result in experiencing several problems, especially in areas where default values of object properties are set to null. IBM recommends that customers use the Microsoft .NET version 2.0 framework when developing integrations with the Rational Portfolio Manager Web Services API.

Long file names in Microsoft Project

Microsoft Project files in Simplified Chinese that have a file name of more than 133 Chinese characters will fail when importing to Rational Portfolio Manager. The workaround is to rename the file to use less than 133 characters.

PMR 71380 999 672; Workflow conditions with Chinese characters

Rational Portfolio Manager crashes when trying to modify the workflow conditions with Chinese characters. There is no workaround for this issue in this release.

Problems fixed in this release

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

Table 4. Customer originated problems fixed in this release

PMR ID	APAR ID	Description
00194 SGC 821		SP_ROLLUP_TIMEPHASE error in SystemErr.log.

Table 4. Customer originated problems fixed in this release (continued)

PMR ID	APAR ID	Description
01364 49R 000	PK26170	FS Code is nullified for PBFS resources if certain fields are edited.
01578 999 862	PK28861	File processing error on opening/checking out a document.
03329 999 000	PK28013	The individual Scorecards in Scorecard Maps have no color bar.
03585 999 000	PK27734	Missing scope's RTF in Multi-report templates in version 6.2.
04254 49R 000	PK27697	Rational Portfolio Manager version 7.0.1.1 Client uses port 80 when https is selected.
11865 999 000	PK29809	E-mail notification sent for responded to items.
17423 49R 000	PK29482	Task type is incorrect in the Dependency view.
17424 49R 000	PK29483	The same dependency between two task types can be seen in the Dependency view.
17427 49R 000	PK29476	The task start date does not equal the project start date.
17428 49R 000	PK29485	Gaps in the project calendar push the project dates out to 2035.
33179 550 000; 11266 999 000	PK28792; PK29356	Timesheet pivot in Rational Portfolio Manager version 7022 does not return all records in a selected period.
33367 550 000; 01832 49R 000	PK28988; PK28988	Duplicate timesheet records in the Timesheet pivot of the Resource Management view.
57405 227 000		Triple workflow e-mail received when creating/changing document workflows.
57688 999 724	PK26885	German translation correction of the resource portlet headers.
57689 999 724	PK27056	German translation correction of header "Charge %" in the Financials Cross Charge tab.
57692 999 724	PK26884	German translation correction of the resource Identification portlet fields.
57696 999 724	PK26797	German translation correction of the Timesheets Options menu.
57697 999 724	PK26980	Provide German translation of portlets under the fields tab in the customize portlets window.
67287 49R 000	PK26196	Project elements do not have Start/Finish dates.
77630 49R 000	PK21595	Financial data in the General Health pivot doesn't match the Timephased budget pivot.
78365 49R 000	PK31257	E-mail notifications multiple issues.
79508 999 000	PK30697	MM calculation in General Health Pivot & Weekly Resource Utilization & Project deliveables.
00634 SGC 848	PK38676	Duplicated resource in task assignment.
72262 227 000	PK19311	Resource Utilization report fails in 7.0.2.2.
39192 999 000		Charge code types in Project Cross Charge do not rollup.
06836 101 616		Missing JAR files in the middleware's EAR file.

Table 4. Customer originated problems fixed in this release (continued)

PMR ID	APAR ID	Description
00134 SGC 821		Labor cost is wrong when adopting project from template.

Chapter 3. Migrating to this version

Before you begin

Before you proceed with the migration you need to backup the IBM Rational Portfolio Manager database. Make sure that total recovery of the database is possible from this backup. All database migration instructions listed below must be done by the instance owner and the user that connects to the database from the web server.

Note: If you were unsuccessful during migration, you need to restore your old database, check the log files to troubleshoot, and restart the migration steps.

Note: All the migration scripts when transferred to AIX host should preserve their Type/Mode (ASCII/BIN) and Right (file ownership).

Migrating Rational Portfolio Manager on DB2 for UNIX

This section tells you how to migrate the Rational Portfolio Manager database from version 7.0.2.2 to version 7.0.3.3 on DB2 for UNIX.

Note: (for Database Administrators) As a rule of thumb for RPM Database maintenance, schedule a nightly job that will run REORG and RUNSTATS on RPM database tables and then do a rebind of RPM packages using the following command:

```
db2rbind database /l logfile all /u userid /p password
```

You can use ReorgStats70.sh located in the `${MIGRATION_HOME}/Database/DB2/Unix/migration`.

Prerequisites for migration

- A successful Rational Portfolio Manager version 7.0.2.2 installation
- Rational Portfolio Manager version 7.0.3.3 migration package
- DB2 v 8.2
- DB2 migration is performed through a manual process, the migration steps are carried out using UNIX® shell script. RPM migration procedure is using bourne shell interpreter
- Make sure that all .sh files located under `${MIGRATION_HOME}/Database/DB2/Unix/migration`, `${MIGRATION_HOME}/Database/DB2/Unix/csp_Aix`, (if using 32 bit DB2 instance) `${MIGRATION_HOME}/Database/DB2/Unix/csp_Aix64` (if using 64 bit DB2 instance) and `${MIGRATION_HOME}/Database/DB2/Unix/csp_Linux` have execute rights

Definition of terms used in this section

- **Instance Owner:** is the user owning the DB2 Instance which is defined as logical database server environment.
- **Connected User:** is the user who connects to database from web application and has been granted rights to make update, insert, delete, select on database tables. Connected User can be the instance owner too.

You can migrate the database using the schema of your choice:

- Scenario 1: All tables are created using the user name of the instance owner as schema. The instance owner is the user who connects to database from the web application.
- Scenario 2: All tables are created using the user name of the instance owner as schema. The connected user is the user who will be connecting to the database from the web application. The table aliases are created for the connected user. The alias names are created using the user name of the connected user as alias names.

Note: You should choose the scenario that you are using with your current RPM database.

The migration process is carried out through scripts by supplying all the corresponding values for parameters. A message is displayed for each step and a log file is created for each step that you might need to look at in case of unsuccessful migration. You will be asked a series of questions to provide values for parameters.

The log files are located in `${MIGRATION_HOME}/Database/DB2/Unix/migration/Logs` folder. There is one main script file called `migration7033.sh` which carries out all the steps for migration.

Migration steps

1. Stop the web application and the Alert server associated with the RPM database.
2. Go to `${MIGRATION_HOME}/Database/DB2/Unix/migration` and run:
`./migration7033.sh`

Steps used when migrating from version 7.0.2.2

Here are the steps and the names of log files created for each step of migration process:

1. Renames the existing RPM library file located in the `${INSTHOME}/sqllib/` function from `ibmrpm.so` to `ibmrpm_7022.so` for backup, where `${INSTHOME}` is the path to DB2 instance directory where DB2 is installed
2. Copies the RPM library file from `${MIGRATION_HOME}/Database/DB2/Unix/csp_Aix` (if using AIX 32 bit DB2 instance), `${MIGRATION_HOME}/Database/DB2/Unix/csp_Aix64` (if using AIX 64 bit DB2 instance) or `${MIGRATION_HOME}/Database/DB2/Unix/csp_Linux` (if using Linux) to `${INSTHOME}/sqllib/function/` folder
3. Gets the name of the OS in use (if the OS is AIX then will ask for 32 or 64 bit DB2 instance)
4. Checks for the version number in RPM database table to decide whether to continue or exit. If version is other than 7.0.2.2 then exits
5. Stops and starts RPM database
6. Drops triggers > `drop_triggers70.out`
7. It starts the migration process > `migration7033.out`
8. If using scenario 2 creates alias and grants rights for new tables added in migration to the connected user
9. Creates triggers > `triggers70.out`
10. Runs statistics on tables > `Reorgstats70.out`

11. Creates stored procedures for v 7.0.3.3 > createsp.out
12. Binds RPM v 7.0.3.3 code > bindall.out
13. Verifies the count of RPM database objects after migration (table, index, trigger, UDF, and stored procedure counts)
14. The results from step 13 and the required RPM database objects for RPM v 7.0.3.3 are copied into `${MIGRATION_HOME}/Database/DB2/Unix/migration/Logs/DB_CHECK.out` folder. Please verify the `DB_CHECK.out` file for differences. In case of having less DB objects than required for RPM v 7.0.3.3 please contact support. See Chapter 4, "Contacting IBM Customer Support for Rational software products," on page 37
15. Verifies if DDL changes during migration were successful and displays the corresponding success/failure message on the screen and prints out the report into the `DB_CHECK.out` file
16. Checks for successful RPM database code migration > Output will be displayed on the screen and the report will be printed into the `DB_CHECK.out` file

Note: If the output file contains 7.0.3.3, the migration is successful, if not, then verify all the log files. In any case it is recommended to check all the log files.

Note: During the migration steps you might see the following SQLSTATE numbers in your log files. These can be ignored since they are only warnings:

- SQLSTATE=02000 (...the result set of the query is an empty table)
- SQLSTATE=42704 (...is an undefined name)

Earned Value enablement

If you are using Earned Value functionality of Rational Portfolio Manager and you would like the values to be updated on regular basis for all projects, then you can schedule a job that will execute the stored procedure call to update these values. You can use the `rollup_ev.sql` file located in the `${MIGRATION_HOME}/Database/DB2/Unix/migration` directory by editing the file and adding the right parameters for the database name, username and password. Username/password can be the username/password of the instance owner or the connected user depending on the database scenario you are using. This file connects to the Rational Portfolio Manager database specified and calls the earned value stored procedure to update Earned Value for all projects.

Note: It is recommended to run the scheduled job off hours when the usage of the system is minimal, not to hinder user operability.

Deploying Rational Portfolio Manager Application Server

Copying the RPMVersion.xml file

To copy the `RPMVersion.xml` file:

1. Go to `${MIGRATION_HOME}/Webserver` directory and copy `RPMVersion.xml` file into the `${IBMRPM_WAR_HOME}/WEB-INF/classes/conf` directory.

Copying the com directory

Note: Make sure you have a backup of your existing com directory before copying.

To copy the com directory:

1. Go to `${MIGRATION_HOME}/Webserver` directory and copy com directory into the `${IBMRPM_WAR_HOME}/WEB-INF/classes` directory.

Copying the jar files for External Actions

To copy the external actions jar files:

1. Go to `${MIGRATION_HOME}/Webserver/jar` directory and copy all jar files into `${IBMRPM_WAR_HOME}/WEB-INF/lib` directory.

Copying the client installer files

To copy the Client installer files:

1. Go to `${MIGRATION_HOME}/Client_Installers` directory and copy all files into `${IBMRPM_WAR_HOME}/client_installer`

Deploying RPM Web Services API ear module

Note: If you have already deployed RPM Web Services API with your RPM 7.0 installation, you need to uninstall the previous API module from your Application Server and deploy the new ear file supplied with this migration package.

The `rpm-web-services-7.0.3.3.ear` and `rpm-web-services-7.0.3.3.war` files are located in the `${MIGRATION_PACKAGE}/WebServicesAPI` folder.

For detail information about RPM Web Services API refer to `RPM7.0.3.3_Web_Services_API_Guide.pdf` located in the `${MIGRATION_PACKAGE}/Documents` folder.

Updating the session database

The Web Services API session database has a new `WORKFLOW_ID` field. It should be updated automatically when the Web Services API 7.0.3.3 is started. If the automatic update fails, it needs to be done manually. Follow the instructions in the `RPM7.0.3.3_Web_Services_API_Guide.pdf` for deleting and recreating the session database.

Modifying ConnectionPool.ini for Mail Alert Server and External Actions settings

To modify the `ConnectionPool.ini` file:

1. Go to `${IBMRPM_WAR_HOME}/WEB-INF/classes/conf` directory and open `ConnectionPool.ini` for editing.
2. In the Mail Server section add the following values:

Table 5. Settings for Rational Portfolio Manager External Actions

Setting	Notes
<code>ExternalActionTimeout=86400000</code>	Sets the maximum duration, in milliseconds, that the IBM Rational Portfolio Manager will wait for external actions to be completed.

Table 5. Settings for Rational Portfolio Manager External Actions (continued)

Setting	Notes
WorkflowPollingInterval=5000	Sets the polling interval, in milliseconds, in which the IBM Rational Portfolio Manager will verify for new external actions to be started.
WFSchedPollingInterval=60000	Sets the polling interval, in milliseconds, in which the IBM Rational Portfolio Manager will verify for scheduled processes to be started.

Verifying the installation

This section describes the process of verifying that the installation is completed and correctly configured.

Validating the database connection

Validate that the connection to the database was successful by opening the `${WAS_HOME}/AppServer/logs/server1/SystemOut.log` file. Look for `ConnectionPool Loaded (####ms)` value. This value validates that the application is connected to the database.

Testing the Web browser connection

To test the Web browser connection:

1. Open a browser window.
2. Go to `http://hostname:portnumber/webapp/IBMRPM/PMOServlet.wss`

You should see the welcome screen for IBM Rational Portfolio Manager.

Post install activities

For post install steps refer to `Administration_Guide.pdf` document. The post install files are located under `${MIGRATION_HOME}/Post-Install` directory.

Migrating Rational Portfolio Manager on Oracle for UNIX

This section tells you how to migrate the Rational Portfolio Manager database from version 7.0.2.2 to version 7.0.3.3 on Oracle for UNIX.

It is also possible to run the migration scripts from a remote machine. In this case, you need to make sure you can connect to the remote database using SQLplus.

Note: Rational Portfolio Manager 7.0.3.3 migration script uses SQLplus located under `${ORACLE_HOME}/bin` directory. Therefore you should run the migration scripts on a machine that has this utility.

Prerequisites for migration

- A successful Rational Portfolio Manager version 7.0.2.2 installation
- Rational Portfolio Manager version 7.0.3.3 migration package
- SQLplus utility for running Oracle migration scripts
- Oracle migration is carried out through shell scripting using bourne shell environments (sh shell)
- Make sure you have execute rights for `mig_owner.sh` and `mig_con_user.sh` files

Migration steps

Rational Portfolio Manager migration to version 7.0.3.3 has 2 steps:

1. Migrating RPM schema owner
2. Migrating RPM connected user (if a connected user is used)

Steps to migrate RPM schema owner

1. Tablespaces used in the migration scripts are:

- PMO_IDX_64K for indexes
- PMO_DATA_64K for tables

Note: If the tablespaces in your RPM database are different from the above mentioned names, you need to change the name of the tablespaces in the migration scripts in the following file:

```
${MIGRATION_HOME}/Database/Oracle/scripts/step1.sql
```

2. Stop the application server associated with the RPM database
3. Shutdown the RPM database
4. Startup the RPM database
5. Open a shell window and change the directory to `${MIGRATION_HOME}/Database/Oracle` and run `./mig_owner.sh`
Migration script will run and ask you a series of questions:
6. Have you performed pre_migration steps? Before migration you need to backup your database, if you have a backup, answer yes to continue. If you answer no, no migration will be performed
7. The script uses the `${ORACLE_HOME}` environment variable of the machine which you are running the script from. Enter the required information when prompted
8. Is your RPM database installed on this machine? If you answer no, you will be prompted to enter:
 - TNS string
 - IBMRPM schema owner
 - IBMRPM schema owner passwordIf you answer yes, you will be prompted to enter:
 - ORACLE_SID value
 - IBMRPM schema owner
 - IBMRPM schema owner password
9. Are you sure you want to migrate your database now? Answer yes to start the migration
10. At the end of migration you will be provided with migration report. Migration report includes the following information:
 - The current version of the database (which at this level must be 7.0.3.3)
 - The number of invalid objects in the database (which we expect to be 0)
 - The number of objects (needed for 7.0.3.3) for each object type and their status in the migrated RPM database

Note: Comparing the number of objects for each object type in the `YOUR_RPM_DATABASE` and `NUMBER_OF_OBJECTS_MUST_BE` columns helps you to check if the migration has been successful. Obviously we expect these values to be equal.

- The name and type of the missing objects in your database
 - The list of error messages generated during DDL migration (if any)
11. Migration log files will be created under `${MIGRATION_HOME}/Database/Oracle/logs` folder. It is always recommended to look at the log files to see if migration was successful
 12. Stop Oracle listener
`${ORACLE_HOME}/bin/lsnrctl stop`
 13. `LevelingLib.so` located under `${MIGRATION_HOME}/Database/Oracle/leveling/[your OS/your Oracle version]/` folder must be manually copied to the right location on the database server
 14. Start Oracle listener
`${ORACLE_HOME}/bin/lsnrctl start`

Steps to migrate RPM connected user

1. Open a shell window and change the directory to `${MIGRATION_HOME}/Database/Oracle` and run `./mig_con_user.sh`
Migration script will run and ask you a series of questions.
2. The script uses the `${ORACLE_HOME}` environment variable of the machine which you are running the script from. Enter the required information when prompted
3. Is your RPM database installed on this machine? If you answer no, you will be prompted to enter:
 - TNS string
 - IBMRPM schema owner
 - IBMRPM schema owner password
 If you answer yes, you will be prompted to enter:
 - Verify the `ORACLE_SID` value
 - Enter IBMRPM schema owner
 - Enter IBMRPM schema owner password
4. Enter RPM connected user name when prompted
5. Enter RPM connected user password when prompted
6. Enter the password for sys user when prompted
7. Are you sure you want to migrate your connected user now? Answer yes to start the migration
8. Migration log files will be created under `${MIGRATION_HOME}/Database/Oracle/logs` folder. It is always recommended to look at the log files to see if migration was successful

Deploying Rational Portfolio Manager Application Server

Copying the `RPMVersion.xml` file

To copy the `RPMVersion.xml` file:

1. Go to `${MIGRATION_HOME}/Webserver` directory and copy `RPMVersion.xml` file into the `${IBMRPM_WAR_HOME}/WEB-INF/classes/conf` directory.

Copying the com directory

Note: Make sure you have a backup of your existing com directory before copying.

To copy the com directory:

1. Go to `${MIGRATION_HOME}/Webserver` directory and copy com directory into the `${IBMRPM_WAR_HOME}/WEB-INF/classes` directory.

Copying the jar files for External Actions

To copy the external actions jar files:

1. Go to `${MIGRATION_HOME}/Webserver/jar` directory and copy all jar files into `${IBMRPM_WAR_HOME}/WEB-INF/lib` directory.

Copying the client installer files

To copy the Client installer files:

1. Go to `${MIGRATION_HOME}/Client_Installers` directory and copy all files into `${IBMRPM_WAR_HOME}/client_installer`

Deploying RPM Web Services API ear module

Note: If you have already deployed RPM Web Services API with your RPM 7.0 installation, you need to uninstall the previous API module from your Application Server and deploy the new ear file supplied with this migration package.

The `rpm-web-services-7.0.3.3.ear` and `rpm-web-services-7.0.3.3.war` files are located in the `${MIGRATION_PACKAGE}/WebServicesAPI` folder.

For detail information about RPM Web Services API refer to `RPM7.0.3.3_Web_Services_API_Guide.pdf` located in the `${MIGRATION_PACKAGE}/Documents` folder.

Updating the session database

The Web Services API session database has a new `WORKFLOW_ID` field. It should be updated automatically when the Web Services API 7.0.3.3 is started. If the automatic update fails, it needs to be done manually. Follow the instructions in the `RPM7.0.3.3_Web_Services_API_Guide.pdf` for deleting and recreating the session database.

Modifying ConnectionPool.ini for Mail Alert Server and External Actions settings

To modify the `ConnectionPool.ini` file:

1. Go to `${IBMRPM_WAR_HOME}/WEB-INF/classes/conf` directory and open `ConnectionPool.ini` for editing.
2. In the Mail Server section add the following values:

Table 6. Settings for Rational Portfolio Manager External Actions

Setting	Notes
<code>ExternalActionTimeout=86400000</code>	Sets the maximum duration, in milliseconds, that the IBM Rational Portfolio Manager will wait for external actions to be completed.

Table 6. Settings for Rational Portfolio Manager External Actions (continued)

Setting	Notes
WorkflowPollingInterval=5000	Sets the polling interval, in milliseconds, in which the IBM Rational Portfolio Manager will verify for new external actions to be started.
WFSchedPollingInterval=60000	Sets the polling interval, in milliseconds, in which the IBM Rational Portfolio Manager will verify for scheduled processes to be started.

Verifying the installation

This section describes the process of verifying that the installation is completed and correctly configured.

Validating the database connection

Validate that the connection to the database was successful by opening the `${WAS_HOME}/AppServer/logs/server1/SystemOut.log` file. Look for `ConnectionPool Loaded (####ms)` value. This value validates that the application is connected to the database.

Testing the Web browser connection

To test the Web browser connection:

1. Open a browser window.
2. Go to `http://hostname:portnumber/webapp/IBMRPM/PMOServlet.wss`

You should see the welcome screen for IBM Rational Portfolio Manager.

Post install activities

For post install steps refer to `Administration_Guide.pdf` document. The post install files are located under `${MIGRATION_HOME}/Post-Install` directory.

Migrating Rational Portfolio Manager on DB2 for Windows

This section tells you how to migrate the Rational Portfolio Manager database from version 7.0.2.2 to version 7.0.3.3 on DB2 for Windows.

Note: (for Database Administrators) As a rule of thumb for RPM Database maintenance, schedule a nightly job that will run REORG and RUNSTATS on RPM database tables and then do a rebind of RPM packages using the following command:

```
db2rbind database /l logfile all /u userid /p password
```

You can use `ReorgStats70.bat` located in the `%MIGRATION_HOME%\Database\DB2\Windows\migration`.

Prerequisites for migration

- A successful Rational Portfolio Manager version 7.0.2.2 installation
- Rational Portfolio Manager version 7.0.3.3 migration package
- DB2 v 8.2

Definition of terms used in this chapter

- **Instance Owner:** is the user owning the DB2 Instance which is defined as logical database server environment.
- **Connected User:** is the user who connects to database from web application and has been granted rights to make update, insert, delete, select on database tables. Connected User can be the instance owner too.

You can migrate the database using the schema of your choice:

- Scenario 1: All tables are created using the user name of the instance owner as schema. The instance owner is the user who connects to database from the web application.
- Scenario 2: All tables are created using the user name of the instance owner as schema. The connected user is the user who will be connecting to the database from the web application. The table aliases are created for the connected user. The alias names are created using the user name of the connected user as alias names.

Note: You should choose the scenario that you are using with your current RPM database.

The migration process is carried out through batch process by supplying all the corresponding values for parameters. A message is displayed for each step and a log file is created for each step that you might need to look at in case of unsuccessful migration.

The log files are located in %MIGRATION_HOME%\Database\DB2\Windows\migration\Logs folder. There is one main batch process called migration7033.bat which carries out all the steps for migration. During migration process you will be asked a series of questions to supply corresponding values for parameters.

Migration steps

1. Stop the web application and the Alert server associated with the RPM database
2. Go to %MIGRATION_HOME%\Database\DB2\Windows\migration and run:
migration7033

Batch process steps used when migrating from version 7.0.2.2

Here are the steps and the names of log files created for each step of migration process:

1. Renames the existing RPM library file located in the %DB2TEMPDIR%\function and %DB2TEMPDIR%\function\Unfenced from ibmrpm.dll to ibmrpm_7022.dll for backup
2. Copies the RPM library file from %MIGRATION_HOME%\Database\DB2\Windows\csp folder into %DB2TEMPDIR%\function and %DB2TEMPDIR%\function\Unfenced folders
3. Checks for the version number in RPM database table to decide whether to continue or exit. If version is other than 7.0.2.2 then exits
4. Stops and starts RPM database
5. Drops triggers > drop_triggers70.out
6. It starts the migration process > migration7033.out

7. If using scenario 2 creates alias and grants rights for new tables added in migration to the connected user
8. Runs statistics on tables > Reorgstats70.out
9. Creates stored procedures for v 7.0.3.3 > createsp.out
10. Binds RPM v 7.0.3.3 code > bindall.out
11. Verifies the count of RPM database objects after migration (table, index, trigger, UDF, and stored procedure counts)
12. The results from step 11 and the required RPM database objects for RPM v 7.0.3.3 are copied into %MIGRATION_HOME%\Database\DB2\Windows\migration\Logs\DB_CHECK.out folder. Please verify the DB_CHECK.out file for differences. In case of having less DB objects than required for RPM v 7.0.3.3 please contact support. See Chapter 4, "Contacting IBM Customer Support for Rational software products," on page 37
13. Verifies if DDL changes during migration were successful and displays the corresponding success/failure message on the screen and prints out the report into the DB_CHECK.out file
14. Checks for successful RPM database code migration > Output will be displayed on the screen and the report will be printed into the DB_CHECK.out file

Note: If the output contains 7.0.3.3, the migration is successful, if not, then verify all the log files. In any case it is recommended to check all the log files.

Note: During the migration steps you might see the following SQLSTATE numbers in your log files. These can be ignored since they are only warnings:

- SQLSTATE=02000 (...the result set of the query is an empty table)
- SQLSTATE=42704 (...is an undefined name)

Earned Value enablement

If you are using Earned Value functionality of Rational Portfolio Manager and would like the values to be updated on a regular basis for all projects, then you can schedule a job that will execute the stored procedure call to update these values. You can use the rollup_ev.sql file located in the %MIGRATION_HOME%\Database\DB2\Windows\migration directory by editing the file and adding the right parameters for the database name, username and password. Username/password can be the username/password of the instance owner or the connected user depending on the database scenario you are using. This file connects to the Rational Portfolio Manager database specified and calls the earned value stored procedure to update Earned Value for all projects.

Note: It is recommended to run the scheduled job off hours when the usage of the system is minimal, not to hinder user operability.

Deploying Rational Portfolio Manager Application Server

Copying the RPMVersion.xml file

To copy the RPMVersion.xml file:

1. Go to %MIGRATION_HOME%\Webserver directory and copy RPMVersion.xml file into the %IBMRPM_WAR_HOME%\WEB-INF\classes\conf directory.

Copying the com directory

Note: Make sure you have a backup of your existing com directory before copying.

To copy the com directory:

1. Go to %MIGRATION_HOME%\Webserver directory and copy com directory into the %IBMRPM_WAR_HOME%\WEB-INF\classes directory.

Copying the jar files for External Actions

To copy the external actions jar files:

1. Go to %MIGRATION_HOME%\Webserver\jar directory and copy all jar files into %IBMRPM_WAR_HOME%\WEB-INF\lib directory.

Copying the client installer files

To copy the Client installer files:

1. Go to %MIGRATION_HOME%\Client_Installers directory and copy all files into %IBMRPM_WAR_HOME%\client_installer

Deploying RPM Web Services API ear module

Note: If you have already deployed RPM Web Services API with your RPM 7.0 installation, you need to uninstall the previous API module from your Application Server and deploy the new ear file supplied with this migration package.

The rpm-web-services-7.0.3.3.ear and rpm-web-services-7.0.3.3.war files are located in the %MIGRATION_PACKAGE%\WebServicesAPI folder.

For detail information about RPM Web Services API refer to RPM7.0.3.3_Web_Services_API_Guide.pdf located in the %MIGRATION_PACKAGE%\Documents folder.

Updating the session database

The Web Services API session database has a new WORKFLOW_ID field. It should be updated automatically when the Web Services API 7.0.3.3 is started. If the automatic update fails, it needs to be done manually. Follow the instructions in the RPM7.0.3.3_Web_Services_API_Guide.pdf for deleting and recreating the session database.

Modifying ConnectionPool.ini for Mail Alert Server and External Actions settings

To modify the ConnectionPool.ini file:

1. Go to %IBMRPM_WAR_HOME%\WEB-INF\classes\conf directory and open ConnectionPool.ini for editing.
2. In the Mail Server section add the following values:

Table 7. Settings for Rational Portfolio Manager External Actions

Setting	Notes
ExternalActionTimeout=86400000	Sets the maximum duration, in milliseconds, that the IBM Rational Portfolio Manager will wait for external actions to be completed.

Table 7. Settings for Rational Portfolio Manager External Actions (continued)

Setting	Notes
WorkflowPollingInterval=5000	Sets the polling interval, in milliseconds, in which the IBM Rational Portfolio Manager will verify for new external actions to be started.
WFSchedPollingInterval=60000	Sets the polling interval, in milliseconds, in which the IBM Rational Portfolio Manager will verify for scheduled processes to be started.

Verifying the installation

This section describes the process of verifying that the installation is completed and correctly configured.

Validating the database connection

Validate that the connection to the database was successful by opening the %WAS_HOME%\AppServer\logs\server1\SystemOut.log file. Look for ConnectionPool Loaded (####ms) value. This value validates that the application is connected to the database.

Testing the Web browser connection

To test the Web browser connection:

1. Open a browser window.
2. Go to `http://hostname:portnumber/webapp/IBMRPM/PMOServlet.wss`

You should see the welcome screen for IBM Rational Portfolio Manager.

Post install activities

For post install steps refer to Administration_Guide.pdf document. The post install files are located under %MIGRATION_HOME%\Post-Install directory.

Migrating Rational Portfolio Manager on Oracle for Windows

This section tells you how to migrate the Rational Portfolio Manager database from version 7.0.2.2 to version 7.0.3.3 on Oracle for Windows.

It is also possible to run the migration scripts from a remote machine. In this case, you need to make sure you can connect to the remote database using SQLplus.

Note: Rational Portfolio Manager 7.0.3.3 migration script uses SQLplus.exe located under %ORACLE_HOME%\bin directory. Therefore you should run the migration scripts on a machine that has this utility.

Prerequisites for migration

- A successful Rational Portfolio Manager version 7.0.2.2 installation
- Rational Portfolio Manager version 7.0.3.3 migration package
- SQLplus.exe utility for running Oracle migration scripts

Migration steps

Rational Portfolio Manager migration to version 7.0.3.3 has 2 steps:

1. Migrating RPM schema owner
2. Migrating RPM connected user (if a connected user is used)

Steps to migrate RPM schema owner

1. Tablespace used in the migration scripts are:

- PMO_IDX_64K for indexes
- PMO_DATA_64K for tables

Note: If the tablespace in your RPM database is different from the above mentioned names, you need to change the name of the tablespace in the migration scripts in the following file:

```
%MIGRATION_HOME%\Database\Oracle\scripts\step1.sql
```

2. Stop the application server associated with the RPM database
3. Shutdown the RPM database
4. Startup the RPM database
5. Open a command prompt window and change the directory to %MIGRATION_HOME%\Database\Oracle and run mig_owner.bat
Migration script will run and ask you a series of questions:
6. Have you performed pre_migration steps? Before migration you need to backup your database, if you have a backup, answer yes to continue. If you answer no, no migration will be performed
7. The script uses the %ORACLE_HOME% environment variable of the machine which you are running the script from. Enter the required information when prompted
8. Is your RPM database installed on this machine? If you answer no, you will be prompted to enter:
 - TNS string
 - IBMRPM schema owner
 - IBMRPM schema owner passwordIf you answer yes, you will be prompted to enter:
 - ORACLE_SID value
 - IBMRPM schema owner
 - IBMRPM schema owner password
9. Are you sure you want to migrate your database now? Answer yes to start the migration
10. At the end of migration you will be provided with migration report. Migration report includes the following information:
 - The current version of the database (which at this level must be 7.0.3.3)
 - The number of invalid objects in the database (which we expect to be 0)
 - The number of objects (needed for 7.0.3.3) for each object type and their status in the migrated RPM database

Note: Comparing the number of objects for each object type in the **YOUR_RPM_DATABASE** and **NUMBER_OF_OBJECTS_MUST_BE** columns helps you to check if the migration has been successful. Obviously we expect these values to be equal.

- The name and type of the missing objects in your database
 - The list of error messages generated during DDL migration (if any)
11. Migration log files will be created under %MIGRATION_HOME%\Database\Oracle\logs folder. It is always recommended to look at the log files to see if migration was successful
 12. Stop Oracle listener
%ORACLE_HOME%\bin\lsnrctl stop
 13. LevelingLib.dll located under %MIGRATION_HOME%\Database\Oracle\leveling\win\your Oracle version\ folder must be manually copied to the right location on the database server
 14. Start Oracle listener
%ORACLE_HOME%\bin\lsnrctl start

Steps to migrate RPM connected user

1. Open a command prompt window and change the directory to %MIGRATION_HOME%\Database\Oracle and run mig_con_user.bat
Migration script will run and ask you a series of questions.
2. The script uses your %ORACLE_HOME% environment variable of the machine which you are running the script from. Enter the required information when prompted
3. Is your RPM database installed on this machine? If you answer no, you will be prompted to enter:
 - TNS string
 - IBMRPM schema owner
 - IBMRPM schema owner password
 If you answer yes, you will be prompted to enter:
 - Verify the ORACLE_SID value
 - Enter IBMRPM schema owner
 - Enter IBMRPM schema owner password
4. Enter RPM connected user name when prompted
5. Enter RPM connected user password when prompted
6. Enter the password for sys user when prompted
7. Are you sure you want to migrate your connected user now? Answer yes to start the migration
8. Migration log files will be created under %MIGRATION_HOME%\Database\Oracle\logs folder. It is always recommended to look at the log files to see if migration was successful

Deploying Rational Portfolio Manager Application Server

Copying the RPMVersion.xml file

To copy the RPMVersion.xml file:

1. Go to %MIGRATION_HOME%\Webserver directory and copy RPMVersion.xml file into the %IBMRPM_WAR_HOME%\WEB-INF\classes\conf directory.

Copying the com directory

Note: Make sure you have a backup of your existing com directory before copying.

To copy the com directory:

1. Go to %MIGRATION_HOME%\Webserver directory and copy com directory into the %IBMRPM_WAR_HOME%\WEB-INF\classes directory.

Copying the jar files for External Actions

To copy the external actions jar files:

1. Go to %MIGRATION_HOME%\Webserver\jar directory and copy all jar files into %IBMRPM_WAR_HOME%\WEB-INF\lib directory.

Copying the client installer files

To copy the Client installer files:

1. Go to %MIGRATION_HOME%\Client_Installers directory and copy all files into %IBMRPM_WAR_HOME%\client_installer

Deploying RPM Web Services API ear module

Note: If you have already deployed RPM Web Services API with your RPM 7.0 installation, you need to uninstall the previous API module from your Application Server and deploy the new ear file supplied with this migration package.

The rpm-web-services-7.0.3.3.ear and rpm-web-services-7.0.3.3.war files are located in the %MIGRATION_PACKAGE%\WebServicesAPI folder.

For detail information about RPM Web Services API refer to RPM7.0.3.3_Web_Services_API_Guide.pdf located in the %MIGRATION_PACKAGE%\Documents folder.

Updating the session database

The Web Services API session database has a new WORKFLOW_ID field. It should be updated automatically when the Web Services API 7.0.3.3 is started. If the automatic update fails, it needs to be done manually. Follow the instructions in the RPM7.0.3.3_Web_Services_API_Guide.pdf for deleting and recreating the session database.

Modifying ConnectionPool.ini for Mail Alert Server and External Actions settings

To modify the ConnectionPool.ini file:

1. Go to %IBMRPM_WAR_HOME%\WEB-INF\classes\conf directory and open ConnectionPool.ini for editing.
2. In the Mail Server section add the following values:

Table 8. Settings for Rational Portfolio Manager External Actions

Setting	Notes
ExternalActionTimeout=86400000	Sets the maximum duration, in milliseconds, that the IBM Rational Portfolio Manager will wait for external actions to be completed.

Table 8. Settings for Rational Portfolio Manager External Actions (continued)

Setting	Notes
WorkflowPollingInterval=5000	Sets the polling interval, in milliseconds, in which the IBM Rational Portfolio Manager will verify for new external actions to be started.
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1. Open a browser window.
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You should see the welcome screen for IBM Rational Portfolio Manager.

Post install activities

For post install steps refer to Administration_Guide.pdf document. The post install files are located under %MIGRATION_HOME%\Post-Install directory.

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/>.

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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