Rational. Portfolio Manager

Version 6.2.1.2
Windows, UNIX, Linux

Release Notes

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Before using this information, be sure to read the general information under “Notices,” on page 21.

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About this book

This document outlines Rational Portfolio Manager 6.2.1.2 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

Chapter 1. About this release

Customer change requests implemented in 6.2.1.2

This section describes the customer change requests implemented in version 6.2.1.2 of Rational® Portfolio Manager.

Documentation updates

There are new Rational Portfolio Manager 6.2.0.0 installation guides updates which will accompany this migration package. These files are located under `%MIGRATION_HOME%\Documents` directory.

Enabling the HTTP communication between the Rational ProjectConsole™ and the Rational Portfolio Manager servers

Note: This feature has been added to the metrics enablement package beginning with Rational Portfolio Manager release 6.2.1.2.

You can enable HTTP communication among the Rational Portfolio Manager and Rational ProjectConsole components used by the metrics enablement package.

Communication is from:

- The Rational ProjectConsole Designer to the RPMPjCWebService (the middle tier of Rational Portfolio Manager)
- The middle tier of Rational Portfolio Manager to the PjCMetricsWebService (the middle tier or Rational ProjectConsole

You must configure PjCDesigner, RPMPjCWebservice, RPMMiddleTier, and PjCMetricsService as described later in this section.

Installation

To add the HTTP communication feature to your installation:

1. In the %MIGRATION_PACKAGE%\RPMPJCWEBservice\folder, locate the file RPMPjCWebService_6212.zip.
2. Unzip the file.
3. Log on to the Rational Portfolio Manager server. From the server:
   a. Stop the RPMPJCWebServices application.
   b. Backup the RPMPjCWebService.class file located at <*AppServerInstallDir*>..\ ..\WEB-INF\classes\com\ibm\rpm\ws\service.
   c. Replace the RPMPjCWebService.class file with the updated class.
   d. Copy the new protocol.ini file to the following location: <*AppServerInstallDir*>...\..\WEB-INF\classes.
   e. Restart the RPMPJCWebServices application.
4. On the Rational ProjectConsole server, install the Rational Portfolio Metrics package for Rational Portfolio Manager version 6.2.1.2, if you have not yet done so, using the file RPM_Metrics_Enablement_6212.exe.

To enable HTTP communication from the Rational Portfolio Manager server to the Rational ProjectConsole server

To enable HTTP communication from the Rational Portfolio Manager server to the Rational ProjectConsole server, do the following:

1. Open the pjc.properties file on the Rational ProjectConsole server in a text editor. The file is located in C:\Program Files\Rational\Common\rwp\webapps\projectconsole\WEB-INF\classes.
2. Add the pjc.ALLOW_HTTP flag to the file and set it to True. For example:

   ```
   pjc.ALLOW_HTTP=True
   ```
3. Restart Rational Web Platform using the rwp_restart.bat command located in the C:\Program Files\Rational\Common\rwp\bin folder.
4. Open the PJCserver.ini file on the Rational Portfolio Manager server in a text editor. The PJCserver.ini file is located in the applications server directory on the machine on which Rational Portfolio Manager is installed. For example, if you are using a Tomcat web application server, the file can be located in the web-inf\classes directory. Set the protocol to http and set the port to 80. For example:

   ```
   # PjC Server configuration file
   Protocol=http
   ...
   Port=80
   ```
5. Restart the IBMRPM.ear application.
6. Log into the Rational Portfolio Manager client and display the chart templates or a Rational ProjectConsole chart in My Portal.

To enable HTTP communication from the Rational ProjectConsole Designer to the Rational Portfolio Manager server

To enable HTTP communication from the Rational ProjectConsole Designer to the Rational Portfolio Manager server, do the following:

1. Open the protocol.ini file located at *<AppServerInstallDir*..\..\WEB-INF\classes in a text editor.
2. Set the ALLOW_HTTP flag to True.
3. Restart the RPMPJCWebServices application.
4. Start the Rational ProjectConsole Designer application on the Rational ProjectConsole server.
5. Set the protocol to http in the connection to the Rational Portfolio Manager server and set the port value to 80.
6. For all Rational ProjectConsole collection tasks, modify the task's property so that the protocol is set to http and the port value is set to 80.
7. Verify that the Designer can successfully log in.

Disabling HTTP communication

To disable HTTP communication and to enable HTTPs communication from the Rational Portfolio Manager server to the Rational ProjectConsole server, see the section on configuring security features in the *IBM Rational Portfolio Manager Metrics Enablement: Getting Started and Installation Guide*.

To disable HTTP communication and to enable HTTPs from the Rational ProjectConsole server to the Rational Portfolio Manager server, see the section on configuring security features in the *IBM Rational Portfolio Manager Metrics Enablement: Getting Started and Installation Guide*.

PMR 79632 999 000; New column in pivot to provide quick filtering of personal and project tasks

A new column called **Personal Task** has been added under **Task Reference** band in **Monthly Resource Utilization** pivot that allows you to quickly filter the personal and project tasks.

PMR 79579 999 000; New columns in the Demand & Supply pivot

The following columns have been added to the Demand & Supply pivot to help users retrieve more detailed information:

- MM columns (Calendar, Proposed, Planned, Supply, Demand, and Net)
- Organization Codes (Company Code, Division Code, and Department Code)
- Project Manager's name

PMR 78947 999 000; Project Cross Charge pivot weekly dates functions

In the Project Cross Charge pivot now it is possible to adjust the date range freely. If the finish date is earlier than the start date, the start date will change accordingly.

RATLC00249751; Ability to show a header that has a value of (none) after a pivot is exported to CSV

When you export a pivot to CSV, the columns with values (None) or (Null) are displayed correctly.

PMR 80360 999 000; Ability to match Project Cross Charge MM/hours and Monthly Resource Utilization pivot hours

Due to the percent reallocation, the two figures (Project Cross Charge MM/hours and Monthly Resource Utilization pivot hours) were slightly off due to rounding. All pivots were modified to follow the same formula for calculating MM columns.

PM 80588 999 000; Month column in the pivot is descriptive with month name instead of F01, F02, ... F12

For those pivots that display fiscal month, the format will be shown as ″F(01) Feb″, where "01" is the fiscal month, and "Feb" is the calendar 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.

Unable to remove a z-axis from a chart template

After adding and removing a z-axis filter to a chart template, when the chart is viewed in **My Portal** view, it contains the z-axis with no values listed. The workaround is to delete and re-create the chart template. After doing that, you need to edit the chart in **My Portal** view and select the new chart template.

RPM/PjC Integration does not work using Oracle database

Currently, when you attempt to log into the PjC Designer against an RPM server that is using an Oracle database, an error message is received and you are unable to login. The support of Oracle database for RPM/PjC integration will be implemented in the future releases of Rational Portfolio Manager.

Problems fixed in this release

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

Table 1. Customer originated problems fixed in this release

Problem ID	Description
PMR 78353 999 000	Unable to do search on *last name in the Staffing view.
PMR 78819 999 000	Best finish in search results does not match the assignment finish date.
PMR 78961 999 000	Grand Total line not totalling the hours/MM correctly.
PMR 78945 999 000	Layouts in pivots do not save expansions.
PMR 78855 999 000	Project description view layouts do not save changes to the bands/headers displayed in the Resources portlet.
PMR 78954 999 000	Timesheet Pivot does not have 'Save As Is' function.
PMR 79289 999 000	Pivot CSV export problem on percent fields.
PMR 81668 999 000	The Profile level is double counting when it is assigned underneath at the deliverable level.
PMR 80549 999 000	Access violation in the Resource Management view.
PMR 80218 999 000	Cannot open document.
PMR 79508 999 000; PMR 78856 999 000	MM Calculation in General Health Pivot & Weekly Resource Utilization & Project deliveables.
PMR 79445 999 000	Division and Department codes do not roll up in Timesheet.
PMR 79290 999 000	Pivot CSV export problem on group level rows.
PMR 78960 999 000	Grand total line not appearing in pivots.

Table 1. Customer originated problems fixed in this release (continued)

Problem ID	Description
PMR 78854 999 000	The resource name for personal project never gets updated under ″Project″ header in Timesheet pivot even after it is changed by Resource Manager.
PMR 78842 999 000	Printing of reports adds an extra expand (+) sign.
PMR 78027 999 000	Personal project tasks and administrative tasks do not come in to all Timesheets.
PMR 47472 999 616	Unable to view RTF fields attached to scope elements in the report menu.
PMR 20241 999 631	Notification from scope element is getting only the first user in the list of participant.
PMR 76669 49R 000	EAcessViolation in Workflow Design view.
PMR 80101 999 000	Unable to create documents after migrating to 6.2.1.1.
PMR 80118 999 000	Launching workflow.pmo from e-mail does not automatically log you in.
PMR 80121 999 000	Launching workflow.pmo from e-mail and logging in does not take you to communication view.
PMR 80121 999 000	The RPMTray was not auto set to monitor workflows even though the login page had it selected.
PMR 80090 999 000	Error when trying to download settings in 6.2 (environment migrated from 6112)
PMR 80096 999 000	Error when trying to open certain documents after migrating from 6.1.1.2 to 6.2.1.1
PMR 80143 999 000	Cannot template under folders created prior to 6.2

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 bellow 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).

This section outlines the steps to migrate IBM Rational Portfolio Manager Database (DB2® V8.1 and Oracle 9i or 10g) from version 6.2.1.1 to version 6.2.1.2.

Migrating Rational Portfolio Manager on DB2 for UNIX

Prerequisites for migration

- A successful Rational Portfolio Manager version 6.2.1.1 installation
- Rational Portfolio Manager version 6.2.1.2 migration package
- DB2 v 8.1 FP 7, 9a, & 10 (Rational Portfolio Manager 6.2 does not support DB2 v 7.2)
- 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 interpretor
- Make sure that all `.sh` files located under `${MIGRATION_HOME}/Database/DB2/[OS]/migration` and `${MIGRATION_HOME}/Database/DB2/[OS]/csp` 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 `${MIGRATION_HOME}/Database/DB2/[OS]/migration`, and `${MIGRATION_HOME}/Database/DB2/[OS]/csp` folders. There is one main script file called `migration6212.sh` which carries out all the steps for migration.

Migration steps

1. Copy `ibmrpm.so` from `${MIGRATION_HOME}/Database/DB2/[OS]/csp` to `${INSTHOME}/sqllib/function/` directory prior to migration, where `${INSTHOME}` is the path to DB2 instance directory where DB2 is installed.

   Note: Make sure you have a backup of your current library files before copying these files.
2. Stop the web application and the Alert server associated with the RPM database.
3. Go to `${MIGRATION_HOME}/Database/DB2/[OS]/migration` and run:
   `./migration6212.sh`

Steps used when migrating from version 6.2.1.1

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

1. Checks for the version number in RPM database table to decide whether to continue or exit. If version is other than 6.2.1.1 then exits
2. Stops and starts RPM database
3. Drops the triggers of RPM v 6.2.1.1 database > `drop_triggers62.out`
4. It starts the migration process:`migration6212.out`
5. Creates triggers for RPM v 6.2.1.2 > `triggers62.out`
6. Creates stored procedures for v 6.2.1.2 > `createsp.out`
   `${MIGRATION_HOME}/Database/DB2/[OS]/csp`
7. Binds RPM v 6.2.1.2 code > `bindall.out`
   `${MIGRATION_HOME}/Database/DB2/[OS]/csp`
8. Runs stored procedures to insert default records into RPM database tables > `custom_pivot_initdb.out`
9. Runs statistics on tables > `Reorgstats62.out`
10. Checks for successful migration > Output will be displayed on the screen

Note: If the output file contains 6.2.1.2, 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)

Deploying Rational Portfolio Manager Application Server

Modifying the RPMVersion.xml file

To modify the RPMVersion.xml file:

1. Go to ${IBMRPM_WAR_HOME}/WEB-INF/classes directory and open RPMVersion.xml for editing.
2. Change the version number from 6.2.1.1 to 6.2.1.2
3. Save and close the file. The new settings will take effect when the web application server is loaded.

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

Copying the com folder

Note: Make sure you have a backup of your existing com folder.

To copy the com folder:

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

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 6.2.1.1 to version 6.2.1.2 on Oracle.

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 6.2.1.2 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 6.2.1.1 installation
- Rational Portfolio Manager version 6.2.1.2 migration package
- `SQLplus` utility for running Oracle migration scripts
- Oracle migration is carried out through shell script using korn or bash shell environments
- Make sure you have execute rights for `mig_owner.sh`, and `mig_con_user.sh` files

Migration steps

Rational Portfolio Manager migration to version 6.2.1.2 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_DATA_64K` for tables
   - `PMO_IDX_64K` for indexes

   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 files:

   `${MIGRATION_HOME}/Database/Oracle/scripts/step1.sql`
2. Stop the application server associated with the RPM database
3. Shutdown the RPM database
4. Startup the RPM database
5. Open a shell window and change the directory to `${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 your `${ORACLE_HOME}` environment variable. 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 password

   If 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 6.2.1.2)
    - The number of invalid objects in the database (which we expect to be 0)
    - The number of objects (needed for 6.2.1.2) 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.
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

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.sh`

   Migration script will run and ask you a series of questions.
2. The script uses your `${ORACLE_HOME}` environment variable. 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

Modifying the RPMVersion.xml file

To modify the `RPMVersion.xml` file:

1. Go to `${IBMRPM_WAR_HOME}/WEB-INF/classes` directory and open `RPMVersion.xml` for editing.

2. Change the version number from 6.2.1.1 to 6.2.1.2
3. Save and close the file. The new settings will take effect when the web application server is loaded.

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`

Copying the com folder

Note: Make sure you have a backup of your existing com folder.

To copy the com folder:

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

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®

Prerequisites for migration

- A successful Rational Portfolio Manager version 6.2.1.1 installation
- Rational Portfolio Manager version 6.2.1.2 migration package
- DB2 v 8.1 FP 7, 9a, & 10 (Rational Portfolio Manager 6.2 does not support DB2 v 7.2)

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 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\migration`, and `%MIGRATION_HOME%\Database\DB2\csp` folders. There is one main batch process called `migration6212.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. Copy `ibmrpm.dll` from `%MIGRATION_HOME%\Database\DB2\csp` to both`%DB2TEMPDIR%function` and `%DB2TEMPDIR%function\unfenced` directories prior to migration.

   Note: Make sure you have a backup of your current library files before copying these files.
2. Stop the web application and the Alert server associated with the RPM database
3. Go to `%MIGRATION_HOME%\Database\DB2\migration` and run:

   `migration6212`

Batch process steps used when migrating from version 6.2.1.1

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

1. Checks for the version number in RPM database table to decide whether to continue or exit. If the version number is other than 6.2.1.1 then exits
2. Stops and starts RPM database
3. Drops the triggers of RPM v6.2.1.1 database > `drop_triggers62.out`
4. It starts the migration process:`migration6211.out`
5. Creates triggers for RPM v 6.2.1.2 > `triggers62.out`
6. Creates stored procedures for v6.2.1.2 > `createsp.out`

   `%MIGRATION_HOME%\Database\DB2\csp`

7. Binds RPM v6.2.1.2 code > `bindall.out`
   `%MIGRATION_HOME%\Database\DB2\csp`
8. Runs stored procedures to insert default records into RPM database tables > `custom_pivot_initdb.out`
9. Runs statistics on tables > `Reorgstats62.out`
10. Checks for successful migration > Output will be displayed on the screen

Note: If the output contains 6.2.1.2, 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)`

Deploying Rational Portfolio Manager Application Server

Modifying the RPMVersion.xml file

To modify the `RPMVersion.xml` file:

1. Go to `%IBMRPM_WAR_HOME%\WEB-INF\classes` directory and open `RPMVersion.xml` for editing.
2. Change the version number from 6.2.1.1 to 6.2.1.2
3. Save and close the file. The new settings will take effect when the web application server is loaded.

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`

Copying the com folder

Note: Make sure you have a backup of your existing com folder.

To copy the com folder:

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

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 6.2.1.1 to version 6.2.1.2 on Oracle.

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 6.2.1.2 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 6.2.1.1 installation
- Rational Portfolio Manager version 6.2.1.2 migration package
- `SQLplus.exe` utility for running Oracle migration scripts

Migration steps

Rational Portfolio Manager migration to version 6.2.1.2 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_DATA_64K` for tables
   - `PMO_IDX_64K` for indexes

   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 files:

   `%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 your %ORACLE_HOME% environment variable. 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 password

   If 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 6.2.1.2)
    - The number of invalid objects in the database (which we expect to be 0)
    - The number of objects (needed for 6.2.1.2) 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.
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

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. 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

Modifying the RPMVersion.xml file

To modify the RPMVersion.xml file:

1. Go to %IBMRPM_WAR_HOME%\WEB-INF\classes directory and open RPMVersion.xml for editing.
2. Change the version number from 6.2.1.1 to 6.2.1.2
3. Save and close the file. The new settings will take effect when the web application server is loaded.

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

Copying the com folder

Note: Make sure you have a backup of your existing com folder.

To copy the com folder:

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

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.

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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