Rational® Portfolio Manager

IBM

Version 7.1
Windows and UNIX

Release Notes

GC23-6120-00

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About this book

This document outlines Rational Portfolio Manager 7.1 release notes. It covers new features added in this release, a list of known problems, and problems that have been fixed in this release.

Who should read this book

This document is intended for any Rational Portfolio Manager user.

Proprietary notice

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Chapter 1. About this release

Documentation roadmap

All documents accompanying this release are available as part of product installation media on the Quick Start CD, or from the IBM® Publications Center.

To locate the Publication Center for your area, go to http://www.ibm.com and search on the term **Publications Center**. Follow the instructions on the IBM Publications Center Web site to locate individual documents. Table 1 describes each of these documents:

Table 1. Rational Portfolio Manager 7.1 documentation

Document	Description
Installation and upgrade guide for Windows®	Provides information about installing and migrating Rational® Portfolio Manager with DB2® or Oracle databases on Windows.
Installation and upgrade guide for UNIX®	Provides information about installing and migrating Rational Portfolio Manager with DB2 or Oracle databases on UNIX systems.
Post installation administration guide	Refer to this document for all post-install activities, including sharing the settings, configuring default calendars and currencies, and so on.
RPM/PjC integration guide	Refer to this document for integration between Rational Portfolio Manager and Rational ProjectConsole™.
RPM/CQ integration guide	Refer to this document for integration between Rational Portfolio Manager and Rational ClearQuest®.
RPM/ReqPro integration guide	Refer to this document for integration between Rational Portfolio Manager and Rational RequisitePro®.
Web Services API guide	Refer to this document for the installation and use of Rational Portfolio Manager Web Services API.
Rational Portfolio Manager Data Warehouse guide	This document provides user and reference information for the Rational Portfolio Manager data warehouse, including how to configure reporting tools for the warehouse, the role of the data warehouse staging area, and reference information on mapping to the Rational Portfolio Manager database.

Latest documentation update for Rational RequisitePro Integration guide

The following section describes the latest documentation update that is not included in the Rational Portfolio Manager/Rational RequisitePro Integration guide.

Rational RequisitePro Web Services installation using Rational Web Platform (RWP)

Prerequisites

- Rational RequisitePro 7.0.1 installed along with RequisiteWeb on the system. (Earlier versions are not supported.)

RequisitePro Web service application configuration

When you install RequisiteWeb, the Rational Web Platform (RWP) and RequisitePro Web service are also installed. In order for the Web service to function properly, you must perform the following configuration steps.

Using RWP as the application server

If you are using RWP as the application server, note the following in the supplied Rational RequisitePro Integration Guide:

- The external application servers mentioned in the *System Requirements* section on page 2 are not required.
- RequisitePro Client for Web, mentioned in the *Rational RequisitePro Components Installation* section on page 3, is mandatory.
- The instructions contained in the section *Deploying the Rational RequisitePro Web Services EAR file* in pages 3 to 8 are not relevant.
- The RequisitePro server port number, shown in Figure 7 on page 12, must be specified as the default port number 11080.

Perform the following steps to use RWP as the application server. These include:

- Configuring the environment variables
- Replacing the proxies.jar file

To configure the environment variables:

1. To edit the file, open the resources.xml file located under: Common\rwp\ EmbeddedExpress\profiles\profile2\config\cells\DefaultNode\nodes\ DefaultNode\servers\server1\
2. Enter the following text between the <xmi:XMI></xmi:XMI> tags:

   <resources.env:ResourceEnvironmentProvider
   xmi:id="ResourceEnvironmentProvider_1166438141305"
   name="reqproprovider">

   <factories xmi:type="resources.env:ResourceEnvEntry"
   xmi:id="ResourceEnvEntry_1166445307290"
   name="REQPRO_CATALOG_PATH" jndiName="REQPRO_CATALOG_PATH"
   referenceable="Referenceable_1166445249482">

   <propertySet xmi:id="J2EEResourcePropertySet_1166445351917">

   <resourceProperties xmi:id="J2EEResourceProperty_1166445351917"
   name="REQPRO_CATALOG_PATH" type="java.lang.String"
   value="%REQPRO_INSTALLATION_DIRECTORY \RequisitePro\ReqWeb\
   projects\catalog.txt" required="false"/>

   </propertySet>

   </factories>

   <factories xmi:type="resources.env:ResourceEnvEntry"
   xmi:id="ResourceEnvEntry_1166445378740" name="RJCB_DLL_PATH"
   jndiName="RJCB_DLL_PATH" referenceable="Referenceable_1166445249482">

```
<propertySet xmi:id="J2EEResourcePropertySet_1166445422846">
<resourceProperties xmi:id="J2EEResourceProperty_1166445422846"
name="RJCB_DLL_PATH" type="java.lang.String" value="
%REQPRO_INSTALLATION_DIRECTORY \Common\RJCB.dll"
required="false"/>
</propertySet>
</factories>
<factories xmi:type="resources.env:ResourceEnvEntry"
xmi:id="ResourceEnvEntry_1166445447477"
name="REQPRO_BRIDGE_DLL_PATH"
jndiName="REQPRO_BRIDGE_DLL_PATH"
referenceable="Referenceable_1166445249482">
<propertySet xmi:id="J2EEResourcePropertySet_1166445486189">
<resourceProperties xmi:id="J2EEResourceProperty_1166445486189"
name="REQPRO_BRIDGE_DLL_PATH" type="java.lang.String"
value="%REQPRO_INSTALLATION_DIRECTORY \RequisitePro\bin\
ReqProBridge.dll" required="false"/>
</propertySet>
</factories>
<referenceables xmi:id="Referenceable_1166445249482"
factoryClassname="com.ibm.reqpro.config.StringFactory"
classname="java.lang.String"/>
</resources.env:ResourceEnvironmentProvider>
```

3. Replace all instances of the environment variable
   '%REQPRO_INSTALLATION_DIRECTORY' by supplying the exact path where
   Rational RequisitePro is installed.
4. Save and close resources.xml.

To replace the proxies.jar file:

1. Copy the proxies.jar file from RequisitePro installation directory
   'RequisitePro\lib' to the following directory:

   Common\rwp\EmbeddedExpress\profiles\profile2\installedApps\
   DefaultNode\WebServices.ear\RequisiteProWebservice.war\WEB-INF\lib\

Migrating from Rational Portfolio Manager 7.0.5.5

The Staffing feature (partially assigning a resource towards a profile) included in
release 7.0.5.5 of Rational Portfolio Manager will not be available in this release.
This feature will be implemented in the upcoming release of Rational Portfolio
Manager.

Security settings changes

This section describes the new or modified security settings in version 7.1 of IBM
Rational Portfolio Manager. For more information about security settings, see the
security section of the Rational Portfolio Manager online help.

New security rights for accessing reports on Common Reporting

New security rights have been added that control access to individual reports from
Common Reporting. To grant these security rights:

1. Log in to Rational Portfolio Manager as an Administrator.
2. From the navigation bar, select Application Administration.
3. Click the **Security** tab.
4. From the **WBS** tab, expand the **Project Group** folder and select a security role.
5. In the right frame, expand **Portfolio Viewer**, then **Data Warehouse**.
6. Grant security rights by selecting the check boxes of group 1 to 31.

Latest supported operating environments

Table 2 lists the operating environments that Rational Portfolio Manager supports.

Table 2. Rational Portfolio Manager latest supported databases

Database	Version	Operating System	Hardware Architecture
DB2	8.2 *	AIX® 5.2 (32-bit)	P5
DB2	8.2	AIX 5.2 (64-bit)	P5
DB2	8.2	AIX 5.3 (32-bit)	P5
DB2	8.2	AIX 5.3 (64-bit)	P5
DB2	8.2	Red Hat Linux® AS Version 4 (32-bit)	Xeon™
DB2	8.2	Red Hat Linux AS Version 4 (64-bit)	Xeon
DB2	8.2	SuSE Linux 9.2 (32-bit)	Xeon
DB2	8.2	SuSE Linux 9.2 (64-bit)	Xeon
DB2	8.2	Solaris 8 (32-bit)	SPARC
Oracle	9.2.0.8	AIX 5.2 (64-bit)	P5
Oracle	9.2.0.8	AIX 5.3 (64-bit)	P5
Oracle	9.2.0.8	Red Hat Linux AS version 3 (32-bit)	Xeon
Oracle	9.2.0.8	HP-UX 11i Version 1 (11.11) (64-bit) (update 4)	HP PA-RISC
Oracle	10.2.0.2	AIX 5.3 (32-bit)	P5
Oracle	10.2.0.2	AIX 5.3 (64-bit)	P5
Oracle	10.2.0.2	HP-UX 11i Version 1 (11.11) (64-Bit)	HP PA-RISC
Oracle	10.2.0.3	Red Hat Linux AS version 3 (32-bit)	Xeon
Oracle	10.2.0.3	Red Hat Linux AS Version 4 (32-bit)	Xeon
Oracle	10.2.0.3	Red Hat Linux AS Version 4 (64-bit)	Xeon
Oracle	10.2.0.3	SuSE Linux 9.2 (32-bit)	Xeon
Oracle	10.2.0.3	SuSE Linux 9.2 (64-bit)	Xeon

Table 2. Rational Portfolio Manager latest supported databases (continued)

Database	Version	Operating System	Hardware Architecture
Oracle	10.2.0.3	Solaris 9 (64-bit) (update 6 or later)	SPARC
Oracle	10.2.0.3	Solaris 10 (64-bit)	SPARC
DB2	8.2 *	Windows 2000 FP 4 (32-bit)	Xeon, Itanium® 2
DB2	8.2	Windows 2003 5.2 (32-bit)	Xeon, Itanium 2
Oracle	9.2.0.8	Windows 2000 FP4 (32-bit)	Xeon, Itanium 2
Oracle	10.2.0.3	Windows 2000 FP 4 (32-bit)	Xeon, Itanium 2
Oracle	10.2.0.3	Windows 2003 (32-bit)	Xeon, Itanium 2

* Also known as 8.1 FP 14.

Note: The versions of DB2 and Oracle identified are the latest versions certified. In general, previous maintenance releases of DB2 and Oracle are also supported. Consult IBM Customer Support for any queries on previous supported versions.

Table 3 lists the application servers that Rational Portfolio Manager supports.

Note: Oracle Application Server and BEA WebLogic Application Server are not certified with this release of Rational Portfolio Manager.

Table 3. Rational Portfolio Manager supported application servers

Application Server	Version
WebSphere®	5.1, 6.0 and 6.1
Apache Tomcat	5.5

Table 4 lists the integrations that Rational Portfolio Manager supports.

Table 4. Rational Portfolio Manager integrations support

Application	Version
Rational ClearQuest	7.0
Microsoft Project	2002 and 2003 (with MDAC 2.6 or higher)
Rational Method Composer	7.1
Rational ProjectConsole	7.0.0.1 and 7.0.1
Rational RequisitePro	7.0.1

BIRT reporting

If you want to design and test BIRT reports, you should download the BIRT Report Designer from the following URL:

http://www.eclipse.org/downloads/download.php?file=/birt/downloads/drops/
R-R1-2_1_2-200702271000/birt-rcp-report-designer-2.1.2.zip

New features in 7.1

This section describes the new features in version 7.1 of Rational Portfolio Manager.

Rational Portfolio Manager data warehouse

Beginning with version 7.1, Rational Portfolio Manager includes a data warehouse capability for use in storing data, querying, and creating pivot reports. The data warehouse offers these benefits:

- Open architecture
- The ability to create your own extract, transform, and load (ETL) processes through the creation of star schema
- Secure access to Rational Portfolio Manager data using third-party tools
- Predefined data warehouse star schemas for a subset of current Rational Portfolio Manager pivots
- Fully documented Rational Portfolio Manager staging tables and data warehouse star schemas
- The ability to uses existing tools and replication technologies without middleware
- Improved performance
- The ability to create trend charts

For complete documentation, including installation instructions, see the *Data Warehouse Guide* and *Installation and Upgrade Guide* on the Quick Start CD.

Rational Portfolio Manager TeamMember edition

Beginning with version 7.1, Rational Portfolio Manager supports an online interface called Rational Portfolio Manager TeamMember. This Web-based application features hyperlinks to application areas dedicated to project activities of interest to project resources assigned to tasks as either task responsible or task team member. The Rational Portfolio Manager TeamMember contains the following application areas:

Timesheet: A representation of the workstation client's timesheet view which users can utilize to report time on assignments, supporting the following features:

- Weekly access based on reporting period selection
- Creation of personal and administrative tasks
- Special time reporting (also known as overtime)
- EETC and percent complete automatic update
- Timesheet saving and submission

Scheduled Work: A grid view showing all tasks currently assigned to the resource or otherwise visible as participant. This view is used to perform the following actions:

- Start work on assignments by allowing resources to add tasks to their timesheet
- Tracking tasks to parent projects by using the Show Context window
- Document task details by adding comments and appending documents by using the Task Properties editor

Scope Elements view: A grid view resources can use to report exceptions during project execution using common Rational Portfolio Manager scope elements such as risks, defects, requirements, and issues. Similar in layout to that of the Scheduled Work view, resources can use a properties editor to fully document each reported exception and append documents.

Documents view: A centralized document management view. Contrary to the previous two views, in which emphasis was either on task or scope element records, this view lists all documents currently visible to the user, either as originator or participant. The Show Context window displays project element association. Users can also utilize the properties editor typical to any record to add context information to each document container and track documents each time they are accessed.

Rational RequisitePro integration

The goal of the Rational Portfolio Manager (project management) integration with Rational RequisitePro (requirements management) is to link requirements with project planning and tracking to help clients achieve the following goals:

- Achieve improved traceability by mapping requirements to project tasks without making significant changes to existing processes and practices.
- Ensure that the appropriate roles are working with the appropriate tools; for example, project managers working with Rational Portfolio Manager and project analysts working with Rational RequisitePro.
- Provide project managers with greater visibility and insight into the relationship between development activities and the requirements from Rational RequisitePro, and facilitate project analysts' ability to trace requirements to corresponding tasks in Rational Portfolio Manager.
- Automate Rational RequisitePro requirement updates into Rational Portfolio Manager requirements; this includes creating, modifying, and deleting.

For more information, see the *IBM Rational Portfolio Manager/IBM Rational RequisitePro Integration Guide*.

My Resources tab

The My Resources tab in the Staffing view provides access to the most commonly used resources across projects without having to search for them. The list of resources available in this tab is generated by adding resources from the Results Set tab, the Project Resources tab, or from the Resources Management view by adding individual resources or a pool of resources.

Project health indicators

The project health indicator is a color representation of the general health of a project. These colors are determined by a series of threshold values specified in the bubble Settings window. The following indicators represent specific aspects or dimensions of a project:

- Cost health
- Revenue/Benefits health
- GP/Savings health
- Schedule health
- Scope Elements health
- Scorecards health

Date format in Rational Portfolio Manager

IBM Rational Portfolio Manager uses the Windows short date format to display dates on data such as pivots, reports, grids, inspectors, portlets, and so on, throughout the application. The short date format is specified by the user in the Regional and Language Options window of the Windows Control Panel.

Grouping attributes

To organize your attribute filters, you can group them together into folders. To create an attribute group container:

1. In the attribute window, right-click By Attributes and select New > Custom Filter Group.

   A folder is created under the By Attributes filter.

2. Enter a name for this filter group.

3. Optional: Organize your attribute filters by dragging the attributes you want into the newly created folder.

Editing attribute filters

In this version of Rational Portfolio Manager, you can edit previously saved attributes. To edit a saved attribute:

1. Expand the **By Attributes** category.

2. Right-click the attribute filter you want to edit and select Edit Attribute Layout.

3. In the Attribute Filter window, add or remove the desired attributes.

4. Click Save. You can also enter a new name in the Attribute Layout Name field.

Attaching attribute filters to view layouts

You can attach attribute filters to your view layouts; every time you start the application, the attribute filter layout will be displayed. To attach an attribute filter to the current layout:

1. Expand the **By Attributes** category.

2. Right-click the attribute filter you want to attach to the view layout and select Attach to Current Layout.

To detach the attribute filter from the view layout:

1. Expand the **By Attributes** category.

2. Right-click the attribute filter that is attached to the view layout and select Detach from Current Layout.

Read-only fields

The description view read-only fields (due to security or the layout definition) are displayed in a light shade of grey to differentiate between the editable fields.

Identification		▫ ☐
Name	Requirement	
Rank	500	
Priority	500	
Reference Number	9708	
External Ref #		
Client Name		
Asset Name		
Asset Code	None	
Duplicate #		
Element Security	Project Level	
Target Date		
Est. Start	10/10/2006	
Est. Finish		
State	Open	

Multi-select modify feature

It is now possible to select multiple items of the same type in the Work Management view and modify them. To modify multiple items in the Work Management view:

1. From the navigation bar select Work Management.
2. In the Work Management view, select multiple projects, deliverables, tasks, or milestones that you want to modify.
3. Right-click and select Edit > Modify.The Modify window opens.

   For projects and deliverables, you can modify priority, state, and estimated start and finish dates in the Identification portlet. Estimated start and finish dates are excluded for tasks and milestones.

4. In the Attributes portlet, you can add, remove, or edit any existing attributes.
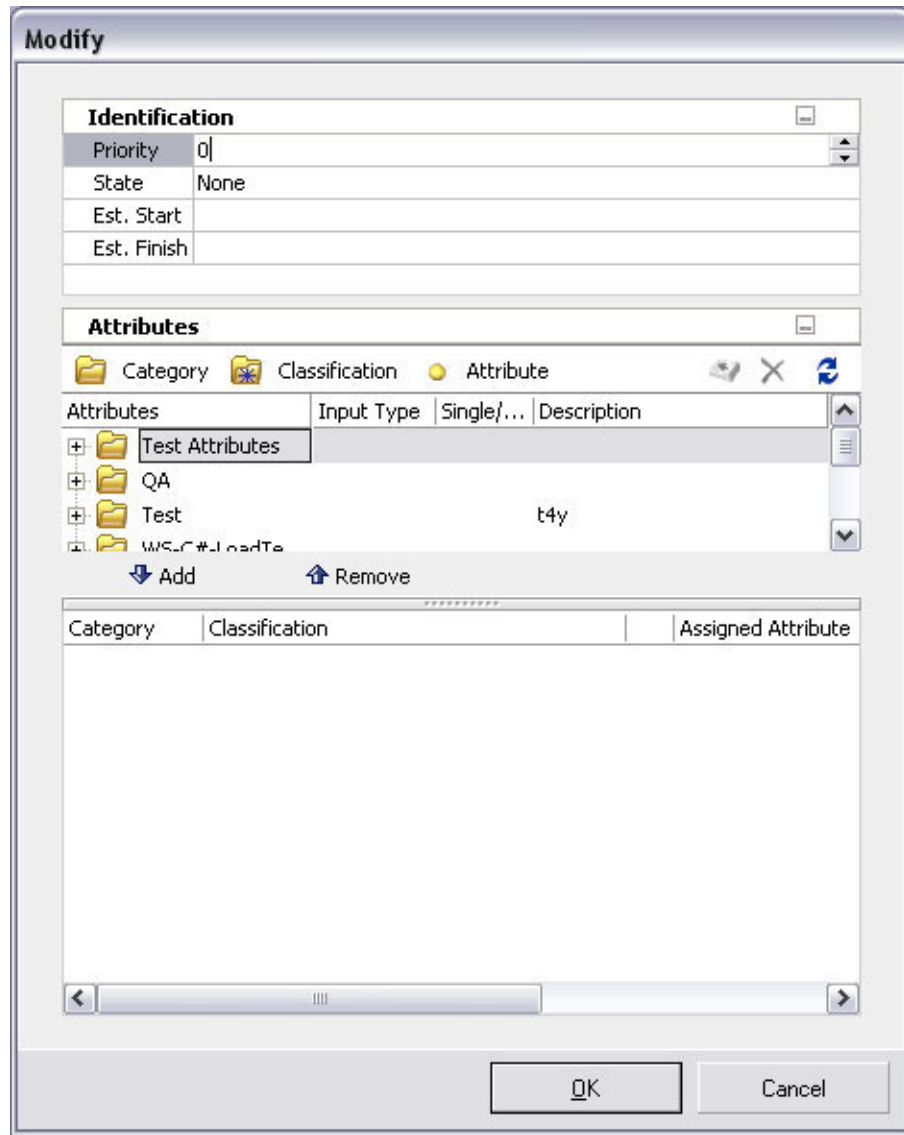
5. Click **OK**, and then click **OK** again to confirm your changes. The system checks out the selected elements, applies the changes, and displays the following window for confirmation.
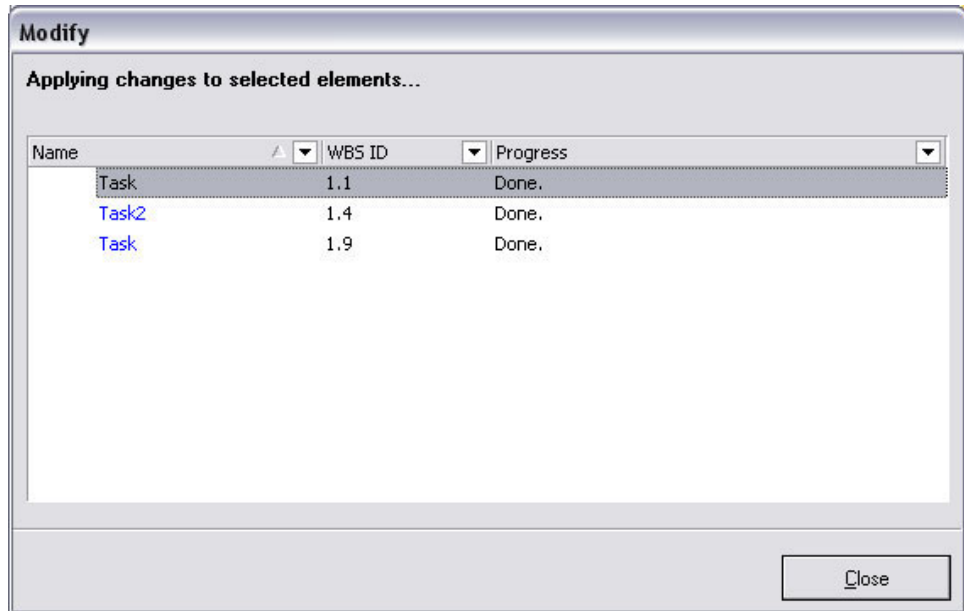
6. Click **Close** and return to the Work Management view.

Note: The modify element security right is enforced, ensuring that only those elements with the proper security rights can be modified.

Displaying multiple description views

It is now possible to open a separate description view for any element in the Work Management, Scope Management, Resource Management, Clients/Cost Centers, and Asset views. To open a description view in a new window:

1. Select an element from any of the aforementioned views.
2. Right-click and select **Open in New Window**.
3. Check out the description view and modify it as necessary.
4. Close the description view by clicking the **X** button in the toolbar or selecting **Exit** from the **File** menu.

Copy as link feature

You can use the copy as link feature to copy the link of any element to the clipboard and paste it into any Rich Text Field (RTF) portlet for execution. Security permitting, clicking the link in the RTF portlet opens the description view of that element in a new window. To use the copy as link feature:

1. Right-click an element and select **Copy as Link**.
2. Open the description view of another element.
3. Expand an RTF portlet and paste the link.
4. Click the link to open the description view of that element in a new window.

WBS inline editing

Using Work Management inline editing, you can update data in the following fields:

- **Workflow Collaboration** band > **State** header
- **Quick Status** band > **Start** header (only for tasks and milestones in proposed mode)

- **Quick Status** band > **Finish** header (only for tasks and milestones in proposed mode)
- **Quick Status** band > **Dur.** header (only for tasks and milestones in proposed mode)
- **Resources** band > **Assigned** header

Rational ClearQuest scheduled synchronization

It is now possible to schedule a synchronization job for Rational ClearQuest projects in Rational Portfolio Manager. When enabled, synchronization happens for each project at the interval of time specified in the ClearQuest Integration portlet. By default, the scheduled synchronization is disabled. To enable the scheduled synchronization:

1. From the Work Management view, double-click a project that has a Rational ClearQuest mapping profile to open its description view.
2. Check out the description view and expand the **ClearQuest Integration** portlet.
3. Select the down arrow in the **Scheduled Synchronization** field and select an interval of time required to perform the synchronization.

ClearQuest Integration		
Scheduled Synchronization	Disabled	
Mapping Profile	Disabled	
Last Synchronized	1 hour	
Synchronize Precedence	2 hours	
	3 hours	
	1 day	
	2 days	
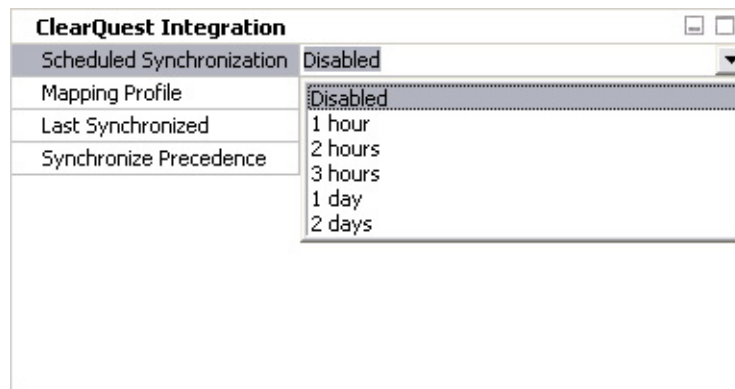
Exporting Rational Portfolio Manager tasks to Rational ClearQuest

Using this feature, you can export tasks that have been created in Rational Portfolio Manager as Rational ClearQuest records. Based on the default mandatory values for the Rational ClearQuest record types saved in the mapping profile, a new Rational ClearQuest record is created. This newly created Rational ClearQuest record will be linked to the Rational Portfolio Manager task. To use this feature:

1. From the Work Management view expand a project and select the task that you want to export as ClearQuest record.

   Note: The project must have a Rational ClearQuest mapping profile assigned.
2. Right-click the task and select **ClearQuest Integration** > **Export Record**.
3. Enter your Rational ClearQuest log in information.
4. In the export window, select the Rational ClearQuest record type from the drop-down list.
5. Click **Export** to start the Rational ClearQuest Web client for the selected record.
6. Fill in the required fields and then click **Save**.

After the Rational ClearQuest record is created and saved, you can synchronize the task in Rational Portfolio Manager.

Creating project scope elements from Rational ClearQuest records

Using this feature you can import Rational ClearQuest records into Rational Portfolio Manager as scope elements.

Dragging enhancement

When performing a dragging operation in any Rational Portfolio Manager tree views, there is a new visual indicator (a black L-shaped line) that shows where the item in the tree is being dropped.

Cannot Drop icon

When you attempt to drag an item to a location where the item cannot be moved, the following cursor is displayed.
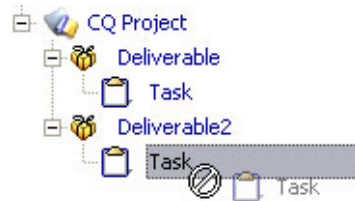
Sibling move

When performing a sibling move operation in any Rational Portfolio Manager tree views at the same level, there is a visual indicator (a blue line) that shows where the item in the tree is being dropped.

Note: Holding the Shift key after clicking the item will change the drag operation to a sibling move mode.

Enhancements to the Rational Method Composer integration

You can use the Rational Portfolio Manager and Rational Method Composer integration to integrate process and project management. You can customize and configure a process in Rational Method Composer, including work breakdown structures (WBS). Information about exporting Rational Method Composer structures is available in Rational Method Composer product documentation. After it is exported to a process XML file, you can import the work breakdown structure

into Rational Portfolio Manager for use in creating a new project or proposal. You can use the features of the Rational Portfolio Manager integration with Rational Method Composer to perform the following actions:

- Import roles associated with tasks, including the Rational Method Composer roles **Additional Performer** and **Assisted by**. In Rational Portfolio Manager, these are mapped to Task Team Member and Task Participant respectively.

- Import template items for dependencies, including predecessor and successor tasks.

- Update existing templates to synchronize with changes made to corresponding templates in the Rational Method Composer. These include additions or deletions of task descriptors, work products, roles or performers, and security levels for roles or performers.

- Create new proposals directly from templates imported from Rational Method Composer delivery processes. The delivery process describes a complete project life cycle and is commonly used as a reference for creating projects with similar characteristics. In earlier releases, delivery processes were imported as summary tasks. They are now imported as proposals, , so that you can reuse the template with the **Adopt** option to create new proposals.

- Import effort estimates. Rational Method Composer version 7.1 supports the ability to perform effort estimates. When you import process XML files with estimated efforts, these values are imported in Rational Portfolio Manager.

- Create work product placeholders in templates. Work products can be Outcomes, Artifacts, Deliverables, and so on. The imported work product contains information about its type, and is associated with URLs that point to the actual published content corresponding to that work product. For example, if a work product is an artifact, it has a URL associated with it, with the name Artifact specifying its type. Any template references for the work product are added as URLs under the document placeholder.

- Import a published Web site from Rational Method Composer to Rational Portfolio Manager with greater efficiency. You can now import a Web site by specifying it in a Rational Method Composer template, or while importing a Rational Method Composer template.

Table 5. Rational Method Composer version support for integration features

Features	Rational Method Composer version
Import dependencies in Rational Method Composer	All Rational Method Composer versions supporting the Rational Portfolio Manager integration (Rational Method Composer 7.0, 7.0.1, 7.1)
Import Rational Method Composer Template of delivery process as proposal into Rational Portfolio Manager	All Rational Method Composer versions supporting the Rational Portfolio Manager integration (Rational Method Composer 7.0, 7.0.1, 7.1)
Map all roles of Rational Method Composer task descriptor to corresponding Rational Portfolio Manager task	Rational Method Composer 7.1
Update Rational Portfolio Manager template if same template is imported in Rational Portfolio Manager	Rational Method Composer 7.1

Copying resources in the Resource Management view

In this version of Rational Portfolio Manager, you can copy resources in the Resource Management view from one pool to another, or within the same resource pool. To copy resources:

1. From the navigation bar, select Resource Management.
2. Expand the resource pool that you want to copy the resources from.
3. Right-click a resource and select **Edit** > **Copy**.
4. Right-click the same pool or a different pool and select **Edit** > **Paste**.
5. In the Copy Resource window, enter a unique resource logon name in the field and then click **OK**.
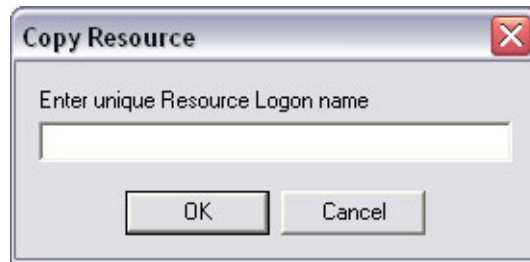
Note: If the resource name entered in the field is already used in the system, the following error message will be displayed and the copy operation will be cancelled.

Copying resources by using the drag-and-drop feature

To copy and paste resources by using the drag-and-drop feature:

1. From the navigation bar, select Resource Management
2. Expand the resource pool that you want to copy the resources from.
3. Select the resource and press and hold the Ctrl key.
4. Drag the resource onto the same pool or a different pool when the following cursor is displayed.

5. . In the Copy Resource window, enter a unique logon resource name in the field, and then click **OK**.

Adding and removing multiple resource assignments

It is now possible to assign work to multiple resources at the same time. To assign work to multiple resources:

1. From the Work Management view select the WBS element that you want to assign resources to.

2. On the toolbar, click the **Staffing** icon, and then click **Search/Assign**.

3. Search for resources.

4. In the **Results Set** tab select multiple resources from the top frame by pressing Shift or Ctrl as you select your resources.

5. Click **Assign**.

   Note: The resources that are assigned to elements stay in the upper frame.

6. Optional: Remove multiple resources by selecting the resources from the bottom frame and clicking **Remove**.

7. . In the Remove Assignment window select the **Apply to All** check box and then click **Remove** or **Replace Resource with Profile**.

   Note: If **Apply to All** is not selected, the Remove Assignment window will open for each of the selected resources, prompting for a confirmation to delete.

Approve/reject multiple timesheet records

In this version of Rational Portfolio Manager, you can select multiple timesheet records in the Timesheets view and approve or reject them simultaneously. To approve or reject multiple timesheet records:

1. From the navigation bar, select Timesheets.

2. From the Filter area select one of My Teams' Work filters.

3. From the date selection in the toolbar, select a week that has a submitted timesheet.

4. Expand the projects to the resource level.

5. Press Shift or Ctrl keys as you select multiple resources.

6. Right-click and approve or reject the timesheet by selecting the option from the context-sensitive menu.
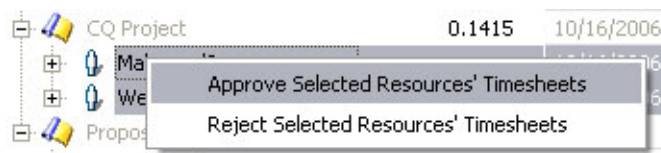
Note: If you select only one resource, you must check out the timesheet before you can approve or reject it. Selecting multiple resources does not require that the timesheets be checked out.

Sharing personal settings and layouts

In this version of Rational Portfolio Manager, you can customize and create view layouts and share them with other users across the repository. Imported settings could eventually be published to the server by an administrator. The following settings can be shared:

- Tree layouts
- Investment map configurations
- OLAP pivot layouts
- OLAP pivot graphs
- Report templates
- Portlet layouts (description views)

Saving, sharing, and importing layouts and personal settings

To share layouts, perform the following actions:

- In any tree views right click on the band and select **Share this Layout**.
- In any description views click the **Share** icon in the toolbar and select **Share this Layout**.
- In the Investment Maps view right click in the map selector and select **Share this Setting**.
- In OLAP Pivots right click on the band and select **Share this Layout**.
- In pivot graphs right click in the graph selector and select **Share this Graph**.
- In Reports view right click on your customized report and select **Share** -> **Share this Report**.

After you share a layout, the Save window opens. To save a layout, enter a name, specify a location, and then click **Save**. You can then send your saved layout to other users for import by e-mail or as a document attachment in Rational Portfolio Manager.

Note: Shared layouts and settings can only be imported to those views where it was originally saved. For example, a description view layout cannot be imported as an OLAP pivot layout.

To import a layout or setting, navigate to the view from which you want to import the layout or setting, and then perform one of the following actions:

- In any tree views right click on the band and select **Import Layouts**.
- In any description views click the **Share** icon in the toolbar and select **Import Layouts**.
- In the Investment Maps view right click in the map selector and select **Import Settings**.
- In OLAP Pivots right click on the band and select **Import Layouts**.
- In pivot graphs right click in the graph selector and select **Import Graphs**.
- In Reports view right click on your customized report and select **Share** -> **Import Report**.

After you perform any of the previously described actions, the Import window opens. Browse for the file that you want to import and then click **Open**.

Opening element's description views from Dependencies and Duplicate portlets

It is now possible to open the description view of Rational Portfolio Manager elements from the Dependencies portlet, Dependencies view, and the Duplicates portlet. You can open the element description view in a new window by right-clicking the element and selecting **Open in New Window**.

Viewing an element's hierarchy from a flat list view

The Work Management view displays a flat list of all elements from all projects as a result of a WBS search or when a certain filter is applied to the view. Some of these elements could potentially have the same name; therefore, it is beneficial to view the element's hierarchy. To view an element's hierarchy:

1. From the Work Management view that displays a flat list of elements, right click on the element and select **Open in Element View**. (security permitting). The view displays the element with all its parent items and any children, if available.

   Note: All parent items are displayed in grey text. You can open the description view for these parent items, but is read-only.

2. Close the element view and return to the main WBS view by clicking the **Close** icon in the toolbar.

Customize window to display tabs for attributes and custom fields

The Attributes and Custom Fields tabs are added to the Customize window that you can use to drag attributes and custom fields columns to Work Management, Scope Management, Documents, Resources Management, and Assets views. Selectable attributes and custom fields are related to the active view. For example, in the Assets view, only those attributes and custom fields that are directly related to assets will be available in the Customize window. To add attributes or custom fields to view layouts:

1. Right-click the band or header and select **Customize Layout**.
2. Select **Attributes** or **Custom Fields** tabs.
3. Expand the category and drag the required attribute or custom field under the desired band.

   Note: After adding these columns, the view must be refreshed to show the values.

Rational Portfolio Manager main menu

Rational Portfolio Manager version 7.1 introduces a new main menu and toolbar throughout the application that increases usability and simplifies user assistance.

The following tables provide descriptions of each menu item.

Table 6. File menu

Menu item	Description
Open	Opens the description view of the selected element.
Open in New Window	Opens the description view of the selected element in a secondary window.
New	Creates a new element below the currently selected item in the tree.
Import/Export	Imports and exports project data to and from Microsoft® Project. (available for projects and proposals)
History	Displays the history of the currently selected element.
Print	Prints the current tree or description view.
Exit	Exits the application.

Table 7. Edit menu

Menu item	Description
Cut	Performs a cut operation on the currently selected item(s) in the tree.
Copy	Copies the selected item(s) into the clipboard.
Paste	Performs a paste operation. (available after a cut or copy operation)
Modify	Opens the Modify window for multiple selected items.
Delete	Deletes the selected item(s) in the tree.
Convert to	Converts an item to a different element type.
Change State	Displays all available states for the currently selected element, allowing you to change the state.

Table 8. View menu

Menu item	Description
Switch to	Allows you to switch to different modules of the application.
Portfolio Configurator	Opens the Portfolio Configurator window where you can filter your views.
Hide Navigation Bar	Hides the left navigation bar.
Expand	Expands the currently selected element.
Collapse	Collapses the currently selected element.
Refresh	Refreshes the currently selected element.

The Actions menu is a dynamic menu. The content of the menu is based on the currently selected element in the active tree.

Table 9. Work Management Actions menu

Menu item	Description
Check-Out	Checks out the currently selected element and opens its description view.
Check-In	Checks in the currently selected element.
Check-In All	Checks in the currently selected element and all its children.
Undo Check-Out	Checks in the currently selected element without saving, after a check out operation.
Set as Default	Sets the currently selected project as a default project.
Send to Archive	Archives the currently selected project.
Communications	Using the sub-menu, you can start workflow processes, manage workflow items, send staffing requests, and send notifications for the currently selected element in the tree.

Table 9. Work Management Actions menu (continued)

Menu item	Description
Calculate/Level	Using the sub-menu, you can calculate, calculate and level and copy calculated results for the currently selected element in the tree.
Commit Affected Resources	Commits affected resources for the selected project in the tree.
Copy Proposed to Plan	Copies the proposed dates into plan dates for the selected element in the tree.
Baseline	Using the sub-menu, you can save or clear the baseline for the currently selected element in the tree.

Table 10. Scope Management Actions menu

Menu item	Description
Transfer Under WBS Root	Transfers the currently selected scope element under the WBS root element.
Check-Out	Checks out the currently selected element and opens its description view.
Check-In	Checks in the currently selected element.
Check-In All	Checks in the currently selected element and all its children.
Undo Check-Out	Checks in the currently selected element without saving, after a check out operation.
Communications	Using the sub-menu, you can start workflow processes, manage workflow items, and send notifications for the currently selected element in the tree.
Close	Closes the Scope Management view or the scope element description view if it is open. This item is not available if the Scope Management view was accessed from the navigation bar.

Table 11. Communications view Actions menu

Menu item	Description
Reply	Replies to the sender of the notification.
Reply All	Replies to all recipients of the notification.
Forward	Forwards the notification to someone else.
Continue	Continues to next workflow step.
Close	Closes the currently selected notification or process.
Archive	Archives the currently selected notification or process.
Response	Opens the Step Response window where you can submit your vote.

Table 12. Help menu

Menu item	Description
Content	Opens the Rational Portfolio Manager online help.
Welcome	Displays the Rational Portfolio Manager welcome page with a list of tutorials, product tour, and links to other online information.
About	Displays the Rational Portfolio Manager About window.

Chapter 2. Status of change requests

This chapter lists known problems from previous releases of Rational Portfolio Manager which are fixed in this release, as well as limitations in Rational Portfolio Manager 7.1.

Problems fixed in this release

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

Table 13. Customer originated problems fixed in this release

PMR ID	Description
78322 999 000; 71323 370 000	Wrong statement in online help about considering project calendar at assignment.
933323 650 706	Verifying the installation for Tomcat, OAS, and WebLogic application server.
92740 650 706	Installation guide typo: DNSI instead of DNS1.
92606 999 672	Filter of schedule variance (Latest Baseline) under WBS plan show incorrect as WBS variance.
91849 999 000	Fiscal month in Timephased Budgets pivot is confusing.
90946 422 000	Staffing view does not refresh properly.
90594 999 000	Installation guide: JDBC driver settings path in the example is not correct.
89658 49R 000	PBFS tasks stay in ″Pending″ state when trying to synchronize them.
89333 999 672	Cannot remove time codes in the Timesheets view at task level.
88507 49R 000	Wrong resources are displayed in the Skills pivot print preview.
88334 820 820	Synchronizing imported ClearQuest tasks return ″Cannot perform a loadFromXpath on field <Task.LASTMODIFIEDDATE>″ error message.
88022 49R 000	Workstation memory problems running RPM pivots.
87806 820 820	When moving scope elements, incorrect scope element's attributes are assigned.
87805 820 820	Problem with resource's assignment.
87175 999 672	Cannot assign resource to task in Custom Calendar.
87018 820 820	RPMCQ: RPM client is displaying ″Unhandled error: 0″ on login.
86359 010 678	Error ″Security ID not found″ when opening task list in ″My teams work″.

Table 13. Customer originated problems fixed in this release (continued)

PMR ID	Description
85878 000 672	Can't receive email workflow notifications in the process of workflow except workflow complete in 6212.
85763 010 678	Wrong calculate/level results for task sequence order and for contour type hours/day at the project level.
85687 820 820	Online Help: MSP import business rules for actuals.
85403 49R 000	Performance issue when adding dependencies.
85243 999 672	Constraint As Late As Possible (ALAP) cause incorrect display of Gantt chart.
81943 999 000	DOC: The number of Closed state is not shown under My Portal > Change Request State Flow.
81156 49R 000	Typo in Online help Modifying the Resource Executive Access Attribute Portlet at step 5.
80722 49R 000	Access Violation Error when right-clicking on an element in All Summary Types filter.
80406 999 000; 85082 999 672	Scheduled Varinaces, Budget Variances and Work Variance Filters fail to display Projects.
80282 999 672	Scope element RTF field does not show in a report.
79312 422 000	Cost Rate incorrectly set to zero.
79075 999 672	Assign Work option is still available even if Project Assignment Type is set to Duration.
78906 999 000	Pivot report title is missing when clicking on the print icon.
78322 999 000	Resource remains overallocated after leveling when project calendar has 6.5 hour per day.
78114 49R 000	6126 PMOR2 Decommission does not make the total zero in Financials - Worksheet.
77492 49R 000	Missing hours in Timesheet Details By Employee.
76743 227 000	Export fails with errors 5006, 5008 in the ImpEx log.
75470 49R 000	BMS causes discontinue date to change.
71480 370 000	The dependencies among tasks are corrupted after adopting summary task template.
68641 49R 000	6115: PMOR2 Adopt from Template results in 100012 Timeout Transaction Error.
67310 000 672	Unhandled Exception EStringListError when WBS elements are in long Chinese Characters name.
67062 49R 000	Insufficient Work in Timesheet.

Table 13. Customer originated problems fixed in this release (continued)

PMR ID	Description
65365 49R 000	Portfolio Configuration Window gets lost behind RPM.
58503 999 724	Pivot "Cost Center Cross Charge with Attributes": rename bands for Cost Center and Client attributes.
58005 033 000	Security: Duplicate Security Roles for same Resource in Scope Elements.
57718 999 000	Staffing View search by Pools inaccurately pulls up wrong data.
57697 999 724	Provide German translation of portlets under fields tab in customize portlets window.
57357 033 000	Timesheets Not Submitted Report is displaying resources who have submitted their timesheets.
56529 999 000	IBM RPM and IBM CQ Integration guide.
56138 999 616	Resource Utilization pivot inacurate data if resource have multiple competencies.
55506 999 724	Unhandled error -1131 updating: Do Earned Value calculation.
54025 999 616	-803 error after changing task start date.
53425 49R 000	Online Help: Typo on number of Characters allowed in WBS.
52095 344 000	Reports generated based on Custom Fields have data cut off.
48454 49R 000	Charge codes in Scope Elements do not aggregate to project level.
48427 49R 000	Unable to open a zip file. (EOleException error)
48380 49R 000	Possible Race condition With new workflow model queries in midleware.
42721 999 000	Dragging "By Invitation" documents to public folders.
41906 999 000	HTTP Client won't create RPM account if username has space in the name.
41692 999 000	Can delete Attributes in use and the deleted attributes are showing in Investment Maps settings window.
40917 999 000	Unhandled Error: 100, when entering financial info.
39554 49R 000	Attribute numerical value displays as non zero in Graph even if it equals to zero.
37604 019 000	Unhandled error -9999 in Work Management view and Resource Management view.
35550 422 000	weekly Resource Utilization report takes 7 minutes to load.
34863 999 000	WBS element delete is very slow.

Table 13. Customer originated problems fixed in this release (continued)

PMR ID	Description
32507 999 000	Search for template doesn't work.
32283 999 000	Installation Guide supported platform list is wrong.
31812 999 000	Automated Transfer to WBS generates Error Message.
30488 999 000	Copy task from one summary task to another, the placement of the individual task changes order.
30415 422 000	Dialogue Box eat 100% of CPU Performance: CPU Usage.
30020 999 760	Online help error on how to create Organization on WBS.
29740 120 796	Cannot enter Employee Code in Employee Information portlet of a resource.
27890 49R 000	How to do Currency Exchange Rate edits in online help.
27794 821 821	Baselining task erases Planned Dates.
27260 49R 000	PMOR2: Unable to work with Resource record.
24758 230 631	Reference # should not show Project ID number.
24477 230 631	At migration to 7.0.1.1 Client Installer deletes old RPMItray but is not installing new RPMItray.
24437 230 631	DOC: In On-help new feature of Description button is not documented.
22709 370 000	DOC: Timesheet approval instruction in On-line help and RPM adim.app.view is misleading.
17742 072 649	When attempting to re-select a calendar with the new name and check-in the record, an error occurs.
17425 49R 000	DOC: HELP file is missing information about dependencies.
16881 033 724	Provide fix for Oracle to make the document icons visible.
15088 000 672	Documentation needed for mail sever configurations used in ConnectionPool.ini.
14637 001 822	DB2 -117 Database error.
14529 999 000	Can't publish CQ-RPM Profiles.
08308 228 631	Installation Guide for RPM 6.2 misses maximum DPI requirement for Client installation on Windows 2000.
06643 999 760	Gantt view has interruption when forecast date is not accepted.
05672 999 000	Inability to drag a header into a different band.

Table 13. Customer originated problems fixed in this release (continued)

PMR ID	Description
04556 49R 000	DOC: Scope element business rules need to be updated.
04091 999 000	Documentation issues with OS levels.
03338 221 649	Resource assigned as CQ user cannot be un-assigned from a CQ user.
03335 221 649	ClearQuest_Integration_category folder missing in Custom Portlets.
03332 221 649	Profile names disappear in the ClearQuest profile tab.
03189 999 000	The custom fields for custom portlet are not showing from Print Preview.
02966 999 000	Getting Stream Read Error when double clicking on zip files.
02265 49R 000	Paste link option not available for URL elements
00642 SGC 848	Summary tasks don't open the description view in Timesheet.
00158 SGC 821	Online help: using the currency exchange rate to convert to the system default one.
000002 49R 000	Inconsistency in Staffing View bands.
13854 999 000	Document Specific Binary GUI issue results in "Unhandled exception: EVariantError".

Known problems

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

Leveling issue

When leveling a project, the leveling engine incorrectly considers the non-working project calendar exception days. There is no workaround for this issue in this release.

System earned value process does not consider the delay time

The earned value delay information is not consistent when running the system earned value process and running the "Do EV roll up" from the context menu. There is no workaround for this issue in this release.

The earned value Time Variance (TV) is not calculated correctly

The earned value Time Variance (TV) displays the data in percentage instead of weeks. There is no workaround for this issue in this release.

Wrong time-phased information in the Financials portlet

The time-phased data in the Financials portlet are incorrectly calculated and displayed. There is no workaround for this issue in this release.

Automatic time-phasing issue

When estimate dates are changed, automatic time-phasing does not recalculate the values. There is no workaround for this issue in this release.

Saving baseline issue

When estimate values are changed and baseline is saved at the project level with the "Add baseline delta to the project/parent" option selected, the baseline value at the project level under Cost (WBS) is displayed incorrectly.

Downloading documents with non-ASCII character names in the TeamMember edition

Documents with non-ASCII character names (for example, Simplified Chinese) cannot be downloaded using the Rational Portfolio Manager TeamMember edition.

Exporting tasks to Rational ClearQuest

When exporting Rational Portfolio Manager tasks to Rational ClearQuest, the CQ Owner field is not populated with the resource name. There is no workaround for this issue in this release.

Performance issue on importing large Rational Method Composer templates

Importing large templates from Rational Method Composer can take up to 30 minutes to complete, depending on the size of the template. There is no workaround for this issue in this release.

Requirement name limit when importing from Rational RequisitePro

Rational Portfolio Manager imports the Rational RequisitePro Type field and Name field as the requirement name, in this case, if the imported requirement name (Type + Name) is more than 255 bytes, the import will fail with an internal error.

Checking out resources' timesheet

Project Managers and Resource Managers must check out and check in resources' timesheet one at a time. If one timesheet is checked out and you check out a second timesheet without checking in the first one, when resources open their timesheet, it will be locked and cannot be checked out.

Incorrect counter displayed in Scope Management and Documents view

The counter in the Filter area of the Scope Management and Documents view displays the wrong information.

Effort loss when replacing one resource assignment with another

When replacing a resource with another resource in the Project Resources tab of the Staffing view, the EETC becomes red. If you right-click the assignment and accept the EETC, the new replaced effort will be lost. However, if you reject the EETC, the replaced effort will remain.

Incorrect EETC and %C values in the Timesheets view

When entering EETC values for task's steps in the Timesheets view, the task's EETC and %C values are incorrectly calculated and displayed.

RTF editing in TeamMember edition

There is a limitation in the Rational Portfolio Manager TeamMember edition that restricts users from editing the RTF fields for a scope task from the Scheduled Work view. For scope elements that have been converted into tasks and added to the WBS, you need to edit the scope RTF fields from the Scope Management view. If you attempt to edit a scope RTF field from the Scheduled Work view, the following warning is displayed: "Editing this RTF field in Scheduled Work is not supported. Use the corresponding property tab in Scope Elements. Contact Help Desk with ID: 0504.0002."

Problem uploading documents using Internet Explorer in the TeamMember edition

When uploading a document to the Rational Portfolio Manager TeamMember edition, a browser window is presented allowing the user to browse for the document and then upload the selected document. Using Internet Explorer, the upload may fail if the path to the document is too long. As a workaround, upload documents from a folder like c:\temp.

Cannot change the state of an assigned task in the TeamMember edition

When using the Rational Portfolio Manager TeamMember edition, users are required to have both the "Can Edit State" and "Can Close" security rights in order to change the state of a task from the Scheduled Work view. This is different from the native Rational Portfolio Manager client, where only the "Can Edit State" security right is required.

RTF Editor Field cannot be editable after submitting data in the TeamMember edition

There is a limitation in the Rational Portfolio Manager TeamMember edition that restricts users from editing a single RTF field in any edit session. Once you click the Edit button, the selected record is in edit mode. As soon as you click on an RTF field's tab in a property editor, that RTF field is in the edit state. If you click on another RTF field before pressing the save button, a warning is displayed indicating that you can only modify a single RTF field per edit session. If you want to edit an RTF field using the Rational Portfolio Manager TeamMember edition, you should have the desired RTF tab selected when you click the edit button.

Documents created for a scope task in Scheduled Work, appear on the scope element task in the TeamMember edition

If you add a document to a scope element that has been converted into a task and added to the WBS from the Scheduled Work view, the document will actually get added to the scope element, not to the task. You will need to go to the corresponding scope element, or to the documents view to see the document that you have uploaded.

Wrong %C, EETC, and Total values fields in the TeamMember edition

When entering regular and special hours on the same day of the week, the %C, EETC, and Total fields are not always updated properly. There is no workaround for this issue in this release of Rational Portfolio Manager.

Cannot edit some Timesheet properties fields in the TeamMember edition

There are some fields within the Timesheet view that are editable or visible in the native Rational Portfolio Manager application, but are non-editable or not visible in the Rational Portfolio Manager TeamMember edition. These issues should not keep users from filling in their timesheets, and will be addressed in the future releases of Rational Portfolio Manager.

Task assignment security in the TeamMember edition

When the "Can view WBS Schedule information" security right for the Task Responsible role, is unchecked in Application Administration by Project Managers, Rational Portfolio Manager TeamMember users cannot show the task as a planned work in the Scheduled Work view and therefore, the checkbox to add the task to the timesheet is disabled. Rational Portfolio Manager TeamMember users must have the "Can view WBS Schedule information" security right.

Number and date formats in the TeamMember edition

The Rational Portfolio Manager TeamMember edition does not currently handle locale specific number and date formats. All dates are entered and displayed in the Universal Time Format (YYYY-MM-DD).

Uploading documents status message in the TeamMember edition

When uploading a document to the Rational Portfolio Manager TeamMember edition, a browser window is presented allowing the user to browse for the document and then upload the selected document. Once the document upload has been completed, the upload document window is cleared with no status message displayed, even though the document upload was successful. The user simply needs to close this window and continue.

Layout editing in the TeamMember edition

In this release of Rational Portfolio Manager TeamMember edition, the layouts for each grid view and properties view are pre-defined and non-editable. The most commonly used fields are included in each layout. Customizing layouts will be provided in the future release of Rational Portfolio Manager TeamMember edition.

Documents list refresh problem in the TeamMember edition

After adding a new document in the documents property tab of a scope element, scheduled work item, or personal record, the list of documents is not always refreshed properly when using Internet Explorer. This issue does not exist when using Mozilla Firefox. To properly refresh the document list, you may need to switch to another view or record and then back to the original record.

Cannot edit Forecast Constraint Start and Finish Date in the Timesheet view of the TeamMember edition

From the Rational Portfolio Manager TeamMember edition, users are currently unable to edit the Forecast Constraint Start and Finish dates from the Timesheet view. The Rational Portfolio Manager desktop application must be used to update forecast constraint dates.

Data-centric security rules in the TeamMember edition

Rational Portfolio Manager TeamMember edition supports data-centric security rules as opposed to user-interface-centric rules as in the desktop client. Therefore, while a particular field may be visible in the desktop client's grid view and appear empty in it's respective description portlet, it may be hashed-out in the Rational Portfolio Manager TeamMember grid, as well as, the properties panel tabbed field.

Project-level assignment security in the TeamMember edition

There is a limitation in the Rational Portfolio Manager TeamMember for supporting of Assignment Security. While Project-level Security is fully supported, Task-level Security is not.

Incorrect information in the Time-Phased tab of the Financials portlet

After removing a profile assignment from a project, the Time-Phased tab in the Financials portlet does not reflect the changes and shows incorrect information. There is no workaround for this issue in this release.

Leveling project assignments

When leveling a portfolio with over-allocated resources, Rational Portfolio Manager does not resolve the resource over-allocation. There is no workaround for this issue in this release.

Pool names for profiles in the Supply/Demand pivot

The pool names for profiles in the Supply/Demand pivot are not displayed. There is no workaround for this issue in this release.

Archiving projects in the Investment Maps view, does not remove the element from the Work Management view

Projects that are sent to archive from the Investment Maps view, remain visible in the Work Management view. The workaround for this issue is to refresh the Work Management view.

ProjectConsole RGSE (RPM General Scope Elements) collection with all attributes selected in a template

When you select all of the RGSE attributes in a domain source template and run the collection, the ProjectConsole database is locked and no further collection is permitted. There is no workaround for this issue in this release.

PMR 18177 999 000; Applying iFix001 for ProjectConsole breaks the integration between Rational Portfolio Manager and ProjectConsole

In order to configure the RPM/ProjectConsole integration to communicate using HTTP, users are required to modify the PJC.Properties and PJC.Properties.orig configuration files on the ProjectConsole server, setting the flag ALLOW_HTTP=true. Currently, when you install an update to the ProjectConsole server (iFix, FixPack, etc.), that configuration file is getting overwritten with a new version.

After installing any upgrades to the ProjectConsole server, you need to update the PJC.Properties and PJC.Properties.orig files and add the ALLOW_HTTP=true flag back in. This issue will be addressed in a future release of ProjectConsole.

Microsoft .NET version 1.1 limitations

Due to the limitation that in Microsoft .NET 1.1 C# is unable to send null values, customers should be aware that integrations built, using the Rational Portfolio Manager Web Services API, might experience problems when default object property values are set to null. There is no workaround for this issue in this release.

Microsoft .NET version 2.0 limitations

Integrations built using the Rational Portfolio Manager Web Services API with Microsoft .NET 2.0 framework will result in experiencing problems due to the following limitations in Microsoft .NET 2.0.
- C# is unable to decode enumeration values from the SOAP messages RPC encoded mode.
- C# has problems decoding arrays from the SOAP messages in RPC encoded mode.

The workaround is to use the Microsoft .NET version 1.1 framework when developing integrations with the Rational Portfolio Manager Web Services API.

Web Service API field in the WorkElement container

All Xpath queries with the WorkElement.lastModifiedDate field must include the timestamp portion of the date because this field is stored as a TIMESTAMP in the database. If the time portion is not included, you will receive a database error.

Web Services API actual finish date remains null when actual start date and actual duration are saved in minutes

When you save a WorkElement's actual start date and an actual duration in minutes, the actual finish date should be populated on reload, however, the actual finish date remains null. There is no workaround for this issue in this release.

Weekly Timesheet pivot

The Timesheet pivot displays two rows for some weeks when the Weekly option is selected. There is no workaround for this issue in this release.

Long file names in Microsoft Project

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

Running Rational Portfolio Manager TeamMember and RequisitePro integration

Users should be aware that there is a current limitation in running both Rational Portfolio Manager TeamMember and Rational Portfolio Manager/Rational RequisitePro integration on the same WebSphere application server. Note that this limitation does not occur when using Apache Tomcat application server.

Rational ClearQuest and Rational RequisitePro databases

Note that Microsoft Access database cannot be used for Rational ClearQuest and Rational RequisitePro. The supported databases are DB2 and Oracle.

Unable to set a task to a closed state using the TeamMember edition

For the tasks listed in the Rational Portfolio Manager TeamMember edition Scheduled Work view, none of the closed states are listed in the list of available states when editing a task. Users can set the %DC to 100% for duration based tasks to indicate that the task is complete. Users can also set the EETC to zero for effort based tasks to indicate that the task is complete. However, the only way to actually close a task is using the native Rational Portfolio Manager client.

Unable to sort by Project Name in the Scheduled Work view of the TeamMember edition

Currently, the Scheduled Work view of the Rational Portfolio Manager TeamMember edition cannot be sorted by Project/Initiative name. However, you are able to filter by project name to display only the tasks that part of a specified initiative.

Document creation in the TeamMember edition is controlled by project level security settings

When attempting to create and attach a document to either a scope element or a task using the TeamMember edition, the user must have the proper security rights set on the project that contains the selected scope element or task. If the user has document creation rights on the scope element or task element, but not on the parent project, the create document menu(s) in the TeamMember edition will be disabled.

Chapter 3. Contacting IBM Customer Support for Rational software products

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

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

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

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

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

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