

Version 7.1.1.1
Windows and UNIX



Release Notes

Version 7.1.1.1
Windows and UNIX



Release Notes

Before using this information, be sure to read the general information under "Notices," on page 27.

Contents

Tables	v
-------------------------	----------

About this book	vii
----------------------------------	------------

Who should read this book	vii
Proprietary notice	vii

Chapter 1. About this release	1
--	----------

Documentation roadmap	1
Rational Portfolio Manager Information Center	1
ORA-00955 error message while migrating your Oracle database	1
Corrections to the Rational Portfolio Manager 7.1 Data Warehouse Guide	1
Re-importing Rational ClearQuest records after the record or the parent project has been deleted from Rational Portfolio Manager	1
Accessing non-imported Rational ClearQuest data from Rational Portfolio Manager.	2
Synchronization of imported Rational ClearQuest records	3
Changing the EETC value in the Timesheets view	3
Adding resources to My Resources tab from the Resource Management view	3
Supported contour types in Web Services API	3
Validation:	3
Example:	4
Security settings changes	5
Order of Magnitude Cost/Benefit and Pursuit security groups	5
Security groups and security rights name changes	5
Renaming of the security flags in Web Services API	6
Latest supported operating environments.	6
Customer change requests implemented in 7.1.1.1	10
Multiple documents upload and download.	10
Partially assign a resource towards a profile	10

Chapter 2. Status of change requests	13
---	-----------

Problems fixed in this release	13
Known problems	19
Managing the personal and administrative tasks in the TeamMember edition	20
Problem with refreshing the Project Resources tab of the Staffing view on Oracle	20
Multi-select and approve timesheet	20
Lost documents	20
Values lost in the Custom Portlet of the Documents description view.	20
Numeric attributes in saved layouts	20
Status of the Rational Portfolio Manager/Rational ClearQuest resource mapping	20
Dashes disappear on the project assignment level after leveling	21
Database error when replacing a resource with a profile for the second time	21
Profile is still displayed after replacing with a resource	21
Replacing a profile that is shared between a project and a task	21
Rational Method Composer template import with dependencies.	21
RPM/PjC trend charts.	21
Blank drop-down menu in the Icon toolbar.	21

Chapter 3. Migrating to this version	23
---	-----------

Chapter 4. Contacting IBM Customer Support for Rational software products	25
--	-----------

Appendix. Notices	27
------------------------------------	-----------

Tables

1. Security groups and security rights name changes	5	8. Installation Wizard database prerequisite (UNIX)	9
2. Rational Portfolio Manager latest supported databases	6	9. Installation Wizard database prerequisite (Windows)	9
3. Rational Portfolio Manager supported application servers	8	10. Rational Portfolio Manager TeamMember support (UNIX)	9
4. Rational Portfolio Manager integrations support	8	11. Rational Portfolio Manager TeamMember support (Windows)	10
5. Rational Portfolio Manager client requirements	8	12. Customer identified problems fixed in this release	13
6. Installation Wizard application server prerequisites (UNIX)	9		
7. Installation Wizard application server prerequisites (Windows).	9		

About this book

The Rational Portfolio Manager 7.1.1.1 release notes cover the 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 administrators responsible for upgrading Rational Portfolio Manager.

Proprietary notice

Licensed materials – Property of IBM

© Copyright IBM Corp. 1997, 2007

US government users restricted rights – Use, duplication, or disclosure restricted by GSA ADP schedule contract with IBM Corp.

Chapter 1. About this release

Documentation roadmap

The following documents are updated in this release:

- *IBM Rational Portfolio Manager installation and upgrade guide for Windows*
- *IBM Rational Portfolio Manager installation and upgrade guide for UNIX*

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

To locate the Publication Center for your area, go to <http://www.ibm.com/shop/publications/order>. Follow the instructions on the IBM Publications Center Web site to locate individual documents.

Rational Portfolio Manager Information Center

The Rational Portfolio Manager Version 7.1 Information Center is now available at <http://publib.boulder.ibm.com/infocenter/ratportm/v7r1m1/index.jsp>

ORA-00955 error message while migrating your Oracle database

If you have previously migrated your Oracle database from 6.2.x.x or 7.0.x.x to 7.1.0.0 or 7.1.0.1, and are now migrating to this release of Rational Portfolio Manager, the following error message will be generated for DDL migration:

```
CREATE TABLE PROF_ASSIGNMENTS (  
      *
```

```
Error at line 1:
```

```
ORA-00955: name is already used by an existing object
```

This error message is caused by an existing PROF_ASSIGNMENTS table that has already been created with your previous version of Rational Portfolio Manager. This message can be ignored.

Corrections to the Rational Portfolio Manager 7.1 Data Warehouse Guide

The *IBM Rational® Portfolio Manager Data Warehouse Guide* shipped with Rational Portfolio Manager 7.1 incorrectly stated that *"The data warehouse is intended to replace the reporting facility used in earlier versions of Rational Portfolio Manager. That reporting facility is supported in this release, but is likely to be deprecated in the future."* This statement is false, and Rational Portfolio Manager will continue to support the native pivoting and reporting solutions.

Re-importing Rational ClearQuest records after the record or the parent project has been deleted from Rational Portfolio Manager

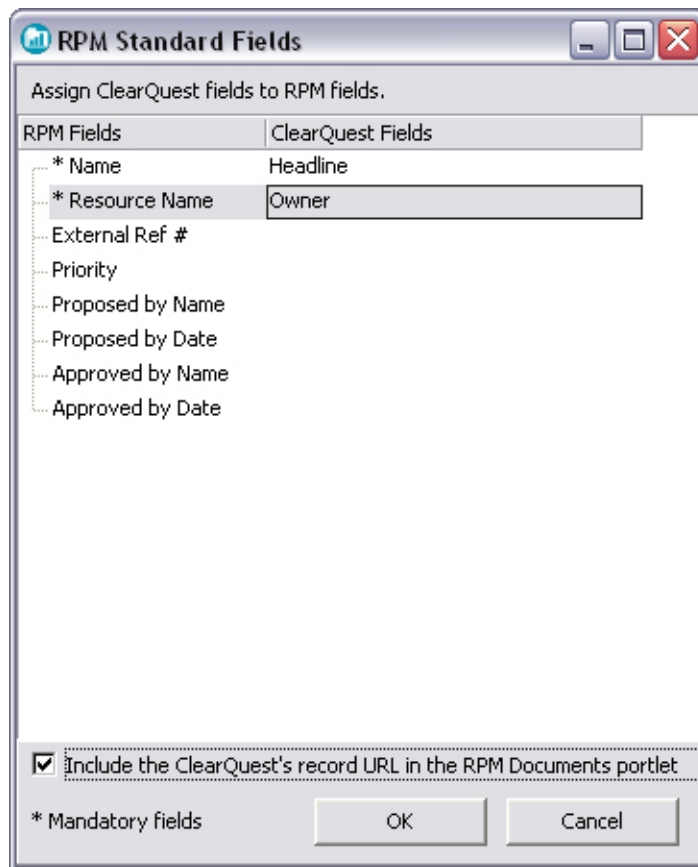
If the previously imported Rational ClearQuest records are deleted from Rational Portfolio Manager, synchronizing the project will reset the integration state. This ensures that these records will be available for re-import.

When parent projects of the imported Rational ClearQuest records are deleted from Rational Portfolio Manager, the integration state for all of the previously imported records is reset. This ensures that these records will be available for re-import.

Accessing non-imported Rational ClearQuest data from Rational Portfolio Manager

Non-imported Rational ClearQuest data such as document attachments can be accessed from the Documents view in Rational Portfolio Manager. By default, all Rational ClearQuest records imported into the Work Management view have a URL link to the original record in Rational ClearQuest. To view these links, select the project containing the imported Rational ClearQuest records in the Work Management view and click the Documents icon in the toolbar.

To create a URL link to the original record in Rational ClearQuest from an imported scope element, the **Include the ClearQuest's record URL in the RPM Documents portlet** checkbox must be selected when creating the scope element profile. This is done in the RPM Standard Fields window:



Imported Rational ClearQuest records as scope elements using this profile contain a URL link to the original record in Rational ClearQuest. To access the URL link, select an imported scope element in the Scope Management view and click the Documents icon in the toolbar.

Synchronization of imported Rational ClearQuest records

When the **Synchronize Imported Tasks and Scope Elements** action is invoked in the Work Management view, all elements under the selected project are synchronized, including all sub-projects and all imported scope elements attached to each project. Each project includes a custom field called "Last synchronized" that contains the last synchronized date in "yyyy-mm-dd hh:mm:ss" format. This date is used to keep track of the synchronization status and must not be modified. If the date format is modified, the system validates the date format and synchronizes all imported elements under the selected project and a new date will be stamped in the "yyyy-mm-dd hh:mm:ss" format.

Note: When synchronization is done from the Work Management view, the **Last Synchronized** value is updated to reflect the latest synchronization state. When synchronization is done from the Scope Management view, the **Last Synchronized** value is updated only if the mapping profile does not contain any task mappings.

Changing the EETC value in the Timesheets view

In Timesheets, if you try to change the EETC value of an assignment with no actual start date to a value smaller than 0.08 for task assignments or 0.25 for steps, the application displays the following error message and restores the previous EETC value: "Cannot delete EETC when there is no Actual Start".

Adding resources to My Resources tab from the Resource Management view

In the Resource Management view, the **Add Resource to My Resources** menu option is only available at the resource level. This option is removed from the resource pool context menu in this release. The online help will be modified to reflect this change in a future release.

Supported contour types in Web Services API

In previous releases of the Rational Portfolio Manager Web Services API, ResourceTaskAssignment was supported without contour types. This type of assignment is still supported in this release for backward compatibility purposes.

The following contour types are supported in this release of Rational Portfolio Manager Web Services API.

- **ASAP:** This contour indicates that the resource will be dedicating an entire working day (8 hours), from the start date on this task until the finish date or total effort is completed.
- **HoursPerDay:** This contour indicates that the resource will be dedicating a specified number of hours per day, from the start date on this task until the finish date, total effort, or the number of occurrences is completed.
- **PercentageDay:** This contour indicates that the resource will be dedicating a specified percentage of a day, from the start date on this task until the finish date, total effort, or the number of occurrences is completed.

Validation:

The above purpose is accomplished by using the contour container. This contour can be passed along with ResourceTaskAssignment. Contour can only be used with

effort based resource TaskAssignments (TaskAssignment should not be null) and it can be used only when the ResourceTaskAssignments is created. Contour cannot be used during an update.

When using contours, all assigned contour types must follow their respective business rules. For example, if the contour is of type ASAP, no value should be passed for Work because it is fixed to eight hours. For all contours, the StartDate is mandatory.

If no contour is used, the total effort (with condition that Resource is being assigned Effort) must be provided through the TaskAssignment of the ResourceTaskAssignment. This total effort value must be set in the ProposedDurationHours field of TaskAssignment. If no value for total effort is passed with the ProposedDurationHours field, then 8 Hours will be considered as the default value for total effort.

Business rules:

Note: The following business rules are only for the contours currently supported.

1. A contour can only be used with effort based resource task assignments (TaskAssignment must not be set to null).
2. A contour can only be used during the creation of ResourceTaskAssignments. A contour cannot be used during an update.
3. StartDate is mandatory when using a contour.
4. If the value of Effort is set, then the value must be passed in minutes.
5. For ASAP contour type:
 - a. The value of Work must be set to null because it is fixed to eight hours.
 - b. The value of Occurrences must be set to null.
 - c. Effort and FinishDate are mutually exclusive. This implies that only one of these two can have a value set to another value than null , the other must be set to null.
6. For the contours of type HoursPerDay and PercentileDay; Effort, FinishDate, and Occurrences are mutually exclusive. This implies that only one of these three can have a value other than null set, the other two must be set to null.
7. If the value of FinishDate is set, its value cannot be before the value set for StartDate.
8. The parent (WorkElement or ScopeElement) of ResourceTaskAssignment must have its associated project in its scope.
9. If contour is used to assign a resource, then the assigned resource must match the respective values passed in the contour. (This rule is not required when assigning profiles).

Example:

A resource that can only dedicate five hours a day has to be assigned to a task using the contour.

Steps to follow:

1. Create a contour of type HoursPerDay.
2. Set the StartDate for the contour.
3. Set the value for either finishDate, Effort, or Occurrences.
4. Set the value for Work to 5 (hours per day).

5. Set the contour object to ResourceTaskAssignment.
6. Save the ResourceTaskAssignment object with the contour and the required parameters using the Save API method.

Security settings changes

This section describes the new or modified security settings in version 7.1.1.1 of IBM Rational Portfolio Manager. For more information about security settings, refer to the security section of the online help.

Order of Magnitude Cost/Benefit and Pursuit security groups

The **Order of Magnitude Cost/Benefit** and **Pursuit** security groups have been moved under a new group called **Opportunity**. To access these security groups:

1. Login to Rational Portfolio Manager as an Administrator.
2. Select Application Administration navigation bar.
3. Select the **Security** tab and **WBS** sub-tab.
4. Expand the **Project Group** and select a security level.
5. In the right frame, expand **Project Element > Opportunity**.

The **Order of Magnitude Cost/Benefit** security rights control the following fields in the **Opportunity** portlet of the project description view:

- **Order of Magnitude Cost**
- **Order of Magnitude Revenue/Benefits**
- **Benefit Begins/Months**
- **Benefit Duration/Months**

The **Pursuit** security rights control the following fields in the **Opportunity** portlet of the project description view:

- **Ext. Client**
- **Pursuit Start**
- **Forecast Close**
- **Probability %**
- **Pursuit Finish**

Security groups and security rights name changes

Table 1 describes the security groups and security rights that have been renamed in this release of Rational Portfolio Manager.

Table 1. Security groups and security rights name changes

Previous name	New name
Portfolio Viewer > View Bubble	Portfolio Viewer > Investment Maps
Portfolio Viewer > Publish Bubble	Portfolio Viewer > Update Project Health Status
Portfolio Viewer > View Scorecards	Portfolio Viewer > Scorecard Maps
Portfolio Viewer > View Pivots	Portfolio Viewer > OLAP Pivots
WBS Hierarchy > Workflow Scheduling > Can View	WBS Hierarchy > Workflow Scheduling > View
WBS Hierarchy > Workflow Scheduling > Can Edit	WBS Hierarchy > Workflow Scheduling > Edit

Table 1. Security groups and security rights name changes (continued)

Previous name	New name
Budget/Cost/Revenue > Financials > Total	Budget/Cost/Revenue > Financials > Summary
Scheduling Information > Dates > Expected	Scheduling Information > Dates > Proposed*

* In the previous release of Rational Portfolio Manager, this security flag was called Expected and controlled the editing of Proposed dates. In this release, this flag was renamed to Proposed to be coherent with what it controls.

Renaming of the security flags in Web Services API

In the previous release of Rational Portfolio Manager Web Services API, the ProposedDate field in WBS was controlled by the wrong security flag, canEditDatesBaseline, and the security flags that controlled this field were not defined. Consequently, updating this field when security was enabled resulted in ambiguous results.

In this release of Rational Portfolio Manager Web Services API, the following security flags have been renamed and properly defined to handle the ProposedDate field in WBS and Scope Management:

1. TaskSecurityRole.canEditDatesExpected renamed to canEditDatesProposed
2. AbstractDeliverableSecurityRole.canEditForChildrenDatesExpected renamed to canEditForChildrenDatesProposed
3. AbstractScopeSecurityRole.canEditDatesExpected renamed to canEditDatesProposed

The flag AbstractDeliverableSecurityRole.canEditDatesBaseline that controlled the ProposedDate field is no longer part of the Rational Portfolio Manager Web Services API.

For the renamed security flags to take effect, users upgrading to Rational Portfolio Manager 7.1.1.1 Web Services API must regenerate the containers and recompile their code. For information about regenerating the containers and recompiling the code see the latest version of the *IBM Rational Portfolio Manager Web Services API Guide*.

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 FP 7*	AIX® 5.2 (32-bit)	P5
DB2	8.2 FP 7	AIX 5.2 (64-bit)	P5
DB2	8.2 FP 7	AIX 5.3 (32-bit)	P5
DB2	8.2 FP 7	AIX 5.3 (64-bit)	P5
DB2	8.2 FP 7	Red Hat Linux® AS Version 3 (32-bit) Kernel Version 2.4.21	Xeon™

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

Database	Version	Operating system	Hardware architecture
DB2	8.2 FP 7	Red Hat Linux AS Version 4 (32-bit) Kernel Version 2.6.9	Xeon
DB2	8.2 FP 7	Red Hat Linux AS Version 4 (64-bit) Kernel Version 2.6.9	Xeon
DB2	8.2 FP 7	SuSE Linux 9.2 (32-bit) Kernel Version 2.6.9	Xeon
DB2	8.2 FP 7	SuSE Linux 9.2 (64-bit) Kernel Version 2.6.9	Xeon
DB2	8.2 FP 7	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
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 FP 7	Windows® 2000 Server Edition FP 4 (32-bit)	Xeon, Itanium® 2
DB2	8.2 FP 7	Windows 2003 Server Edition SP1 (32-bit)	Xeon, Itanium 2
Oracle	9.2.0.8	Windows 2000 Server Edition FP 4 (32-bit)	Xeon, Itanium 2
Oracle	9.2.0.8	Windows 2003 Server Edition SP1 (32-bit)	Xeon, Itanium 2

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

Database	Version	Operating system	Hardware architecture
Oracle	10.2.0.3	Windows 2000 Server Edition FP 4 (32-bit)	Xeon, Itanium 2
Oracle	10.2.0.3	Windows 2003 Server Edition SP1 (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.x.x, 2003.06.15, 2003.06.16
Microsoft® Project *	2002 and 2003 Standalone versions (with MDAC 2.6 or higher)
Rational Method Composer	7.1 and 7.2
Rational ProjectConsole™	7.0.0.1 and 7.0.1
Rational RequisitePro®	7.0.1

* Microsoft Project Server is not supported.

Table 5. Rational Portfolio Manager client requirements

Software	Version
Microsoft Windows XP	<ul style="list-style-type: none"> • Professional SP1 • Professional SP2
Microsoft Windows Vista	Enterprise Edition
Microsoft Windows 2000	<ul style="list-style-type: none"> • Professional (96 DPI®) • Server • Advanced Server (latest service pack)

Table 5. Rational Portfolio Manager client requirements (continued)

Software	Version
Internet Explorer	<ul style="list-style-type: none"> • 6 or higher (with ActiveX installed) • 7 or higher (with ActiveX installed) <p>Only on Windows XP SP2, Vista, and Windows 2000 Server SP1.</p>
Microsoft Project	2002 and 2003 with MDAC* 2.6 or higher for export capabilities.
TAM* WebSeal	6
Citrix	3 and 4

* Microsoft Data Access Component (MDAC)

* Tivoli[®] Access Manager (TAM)

Table 6. Installation Wizard application server prerequisites (UNIX[®])

Application server	Operating system
WebSphere 6.0	AIX 5.3 (32 and 64 bit)
WebSphere 6.1	AIX 5.3 (32 and 64 bit)
Apache Tomcat 5.5	AIX 5.3 (32 and 64 bit)

Table 7. Installation Wizard application server prerequisites (Windows)

Application server	Operating system
WebSphere 6.0	Windows 2000 and Windows 2003 Server Editions
WebSphere 6.1	Windows 2000 and Windows 2003 Server Editions
Apache Tomcat 5.5	Windows 2000 and Windows 2003 Server Editions

Table 8. Installation Wizard database prerequisite (UNIX)

Database	Operating system
DB2 8.2	AIX 5.3 (32 and 64 bit)

Table 9. Installation Wizard database prerequisite (Windows)

Database	Operating system
DB2 8.2	Windows 2000 and Windows 2003 Server Editions

Table 10. Rational Portfolio Manager TeamMember support (UNIX)

Software	Version
FireFox	<ul style="list-style-type: none"> • 1.5 on Red Hat Linux AS version 4 and Red Hat Linux Version 5 • 2.0 on Red Hat Linux AS version 4 and Red Hat Linux Version 5

Table 10. Rational Portfolio Manager TeamMember support (UNIX) (continued)

Software	Version
Internet Explorer	• 6.x

Table 11. Rational Portfolio Manager TeamMember support (Windows)

Software	Version
FireFox	• 1.5 • 2.0
Internet Explorer	• 6.x • 7.0 (only on Windows XP SP2, Vista, and Windows 2000 Server with SP1)

Customer change requests implemented in 7.1.1.1

This section describes the customer change requests implemented in version 7.1.1.1 of IBM Rational Portfolio Manager.

Multiple documents upload and download

With this new feature you can upload or download multiple documents in the Rational Portfolio Manager native client. To download documents:

1. In the Documents view, select multiple documents using the Shift or Ctrl keys.
2. Right-click the selected documents and select **Save To**.
3. Browse for a location on your hard drive and click **Save**.

To upload multiple documents to Rational Portfolio Manager at the same time:

1. Select multiple documents from the Windows browser.
2. Drag and drop the documents into the Documents view in Rational Portfolio Manager.

Partially assign a resource towards a profile

Using this feature you can partially replace a profile assignment with multiple resources with different work contours. To do this:

1. In the Work Management view select a project or a task.
2. Click the **Staffing** icon in the toolbar and select **Search/Assign**.
3. Under **Search/Create** click the Down arrow and select **Profile** from the list.
4. In the **Work** field, enter the required time, for example, 40 hours.
5. Expand the **Competencies** category to the competency level and click **Add**.
6. Click **Create Profile**.
7. Click **Assign > Assign Work**.
8. Click the **Staffing** icon in the toolbar and select **Demand/Supply**.
9. Right-click the profile and select **Search/Assign** (for project level assignments only).

Note: If you are replacing a profile with a resource at the task level, you must expand the profile and select the task before replacing the profile.

10. In the **Work** field of the **Search/Create** tab, enter less time than the original profile assignment, for example 20 hours, and search for a resource.

11. In the **Results Set** tab right-click the required resource and select **Replace**.
12. Back in the **Demand/Supply** view right-click the profile and select **Search/Assign**.
13. Search for another resource and assign the remaining profile assignment.

New bands and headers

The following bands and headers are added:

- **Results Set** tab > lower frame > **Baseline (Initial)** band > **Start, Finish, Work** headers: Display the start date, finish date, and the amount of work of the original profile assignment.
- **Results Set** tab > lower frame > **Name** band > **Profile Name** header: Displays the original profile name.

Business rules

1. There is no partial replacement when replacing multiple assignments (assignments to different tasks) of the same profile within the current project.
2. The Baseline (Initial) band displays the original profile assignment start date, finish date, and work. When the very first resource replacement occurs, the system executes a baseline action for the profile assignment automatically.
3. When replacing a profile at the project or task level, the start date, finish date, work, and contour could be different from the original profile assignment.
4. If the total work of the resource replacement is less than the requested profile work, then the original profile assignment is maintained. The profile work balance is equal to the original work minus the total replacement work.
5. If the remaining work of the original profile is zero, the original profile assignment will be retained with zero work, blank start and finish dates and daily work contour. If the remaining work of the original profile is zero, then further resource replacements will be disabled.
6. The system maintains the original profile assignment with zero work, if the profile is affected to the project or at the task level, as long as the task is in proposed mode. When you copy proposed to plan dates, the system will automatically remove the profile assignments with zero effort at the task level (there is no warning message).
7. It is possible to partially replace a profile with a resource that has already been assigned to the project or to the same element with or without effort.
8. If the EETC is updated (increase or decrease) at the resource replacement level and the resource is removed and replaced with the original profile, the total work including the revised EETC will be added back to the original profile assignment.
9. The start and finish dates of the profile assignment will not change if the daily contour work in the resource replacement is less than daily contour work of the original profile assignment.
10. The start and finish dates of the profile assignment will not change unless the resource replacement forces the system to change the start or finish dates.
11. If after resource replacement the profile assignment start date needs to be recalculated, then the new start date is the first date available after the latest finish date of all resource replacements.
12. If there is a gap between resource replacements, overlapping, or resource replacement contour is different from the original requested contour, then the new start date is the first date available, not necessarily after the latest finish date of all resource replacements.

13. When replacing a profile with a resource, it is possible that the task start and finish dates will be recalculated.
14. When a resource replacement is removed, the remaining work assigned to the resource will be added back to the original profile work and the system will recalculate the new start or finish dates of the profile assignment, based on the current search and assign rules.
15. When removing a resource replacement with actual work and replacing it with the original profile, the actual work will be retained and the unassigned remaining work will be added back to the original profile assignment.
16. When removing a resource replacement which has a different contour than the original profile assignment contour, the original profile contour will not change.
17. The original profile assignment can be deleted at any point in time including after resource replacements.
18. If the resource replacement is deleted after the original profile assignment was deleted, the original profile assignment will be restored with the initial baseline, along with the work and dates of the deleted resource replacement.

Chapter 2. Status of change requests

This chapter lists known problems from previous releases of Rational Portfolio Manager which are fixed in this release, in addition to limitations in Rational Portfolio Manager 7.1.1.1.

Problems fixed in this release

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

Table 12. Customer identified problems fixed in this release

APAR ID	Description
PK46667	Unhandled Exception Error when opening a resource record from the Resources portlet of a pool description view.
PK46739	Leveling does not respect project affectation.
PK46738	Infinite loop in Portfolio Configuration.
PK42220	Web Services API does not use the LDAP configuration.
PK46395	State Notification Portlet is disabled.
PK41533	Copy function duplicates projects in Financials.
PK44361	Leveling of project fails with error message in Alltraces: Lev_finalAlignment.cpp(10637) Exception at Address 008A657B.
PK06548	Message 200043 Element ID Required and Unhandled Exception when creating a personal task.
PK42180	Admin user cannot access portfolio.
PK49599	Custom fields are not displayed properly in the custom pivots.
PK32017	Error -433 when creating a project using a template having more than 158 participants.
PK25414	Timesheet Step Summary Notes are not appearing in the Timesheet Steps pivot.
PK24314	-9999 Database error when deleting scorecards from a project.
PK34012	Folder names are not displayed when exporting to CSV from the Documents view.
PK43635	Adding several single select attributes in executive attribute access portlet.
PK49379	Uploading files with more than 10K are failing with DocumentTransferServlet API.
PK40236	-802 error when trying to open the Projects General Information tab in Application Administration.

Table 12. Customer identified problems fixed in this release (continued)

APAR ID	Description
PK38718	Unable to accept EETC on fixed duration tasks.
PK33028	Error -803 when changing the resource's effective date.
PK45416	Missing Competency in the Resource Utilization pivot.
PK46549	EAccess Violation error when changing the resource management graph from weekly to monthly option in the Resource Management view.
PK34008	RPM sets duration of 1 day on milestones automatically.
PK45389	Can add documents into locked template scope elements.
PK46722	Temporary Attribute Filter is the same but not showed for My Documents and for All Documents.
PK46548	Unhandled Exception error when replacing a profile with a resource that has been previously replaced the same way on the project.
PK46545	Receiving Unhandled Error 0 when baselining a milestone.
PK46761	Typo in the Personal Record > Application/My Settings portlet.
4PK47347	Seeing the 32 digits attributes ID in WBS elements with Attributes Pivot when using a local pivot layout against projects.
PK46878; PK46860; PK46859	The "Documents" and "Scope Management" views are not available from the left side navigator, even though the personal security settings are ON.
PK47082	RPM Window freezes after checking out documents to a local machine.
PK47076	"Save To" for multi selection corrupts documents.
PK42404	The start and finish dates are pushed out when moving/transferring or moving scope elements.
PK47870	Personal project attribute filter does not show counts in the Work Management view.
PK48091	When clicking on the "print" icon, nothing is printed for "Workflow Element Association", "Workflow Role Mapping", and "Workflow Schedule" portlets.
PK48583	The option "Can Copy Calculated Results with Resource Affected Dates Violation" is visible in My Teams' Work > All Work Packages, even though the security right for this option is OFF.

Table 12. Customer identified problems fixed in this release (continued)

APAR ID	Description
PK48450	Duplicate Scorecard Comments when Report Flag is selected.
PK48371	Unable to see Export CSV option in the Documents view at element level.
PK48436	Document Workflow Step only shows possible outcomes when selecting "Show All" next Steps.
PK42991	Text in the External Client field of the Opportunity portlet disappears after adding an attribute and checking-in the Description view.
PK43562	Unable to customize the "Dates (Estimate)" band.
PK43378	Multi Dataset RPM Reports are not including Scope Management.
PK49668	After migrating to RPM 7.1.0.0 no proposal/project is displayed anymore.
PK51801; PK49702	OLAP pivots graph for Resources Management does not show the graph.
PK37020	Alerts failing if more than one Connection Pool is configured.
PK37853	Out of Resources error when selecting Export to CSV.
PK38213	Document Review Workflow shows only the "Close" option.
PK36506	Not able to reduce administrative tasks' plan hours.
PK44007	Unhandled error 100 in Time Phase Budget.
PK43858	Root Deliverable Name is not showing in the Resource Monthly Utilization pivot.
PK49415	Organization icon is not displayed in the Application Administration > Projects General Information tab.
PK44788	Icons for views are not refreshed when switching between different WBS elements.
PK46762	Start Type and Finish Type header names are missing in the Scope Management > Templates view.
PK44528	"Type" should be "Question" and not "Classification" when exporting scorecards to CSV.
PK49661	Limited name input in suggested participants band for Workflow Steps in Application Administration menu > Workflow tab.
PK50341	Dates (WBS Baseline Initial) band is missing in My Work > All Work Packages filter of the Work Management view.

Table 12. Customer identified problems fixed in this release (continued)

APAR ID	Description
PK50904	EOleException Unhandled error message on check-out to option when cancelled.
PK50825	Unhandled Exception error while changing the assigned attribute type in multi-modify window.
PK50953	Saving Attribute Assignment of type date with a null value causes NullPointerException in Web Services.
PK51114	Security right for Multi-select modify feature does not work properly.
PK39982	Problem with renaming private documents.
PK38968	Fix duration effort driven task has wrong actuals and EETC.
PK46008	Reports 1, 2, 3 & 7 need three additional fields.
PK40761	The "Task Analyses Per Team – Template" report throws Unhandled Exception.
PK21402	Next/Previous page buttons are not working when the search result reaches the page maximum at the task level.
PK22903	Scope Management Pivots/Reports -802 error.
PK49449	Cannot Transfer under WBS Root, Scope Exception Message 200315 is generated.
PK42817	Scope Element "Est. Finish" date does not get cleared.
PK38496	Wrong calculate/level results for task sequence order and for contour type hours/day at project level.
PK45836	Calculate/level duration and resource assignment.
PK48759	Calculate/level throws errors in the Communications view.
PK36211	Incorrect parameters in the Alert Message.
PK42545	Calculate/leveling problem.
PK28119	The ETC and EAC columns under "Revenue/Benefit (Financial Totals)" are different from the Financials portlet.
PK36350; PK42505	"Timesheet is checked out by <PM>" error when timesheet is not checked out.
PK51804	"Calculate" function does not maintain 'Fixed Duration' assignment contour when is executed.
PK51702	Many requests are failing intermittently with Oracle.
PK51754	Resources portlet displaying Baseline (Initial) header instead of Resource Name and Security Level header.

Table 12. Customer identified problems fixed in this release (continued)

APAR ID	Description
PK51817	Hard-deleting a document will corrupt the child counts of the parent document.
PK51821; PK51944	Creating new filters results in a client crash when creating new organization filters after migration from 7.0.0.0
PK51891	Web UI does not work on 2.3 J2EE servers such as Websphere 5.1 and Web Logic 8.
PK52026	Editable 'Description view' for parent WBS element when the child element is open in the Element view.
PK51176	"Text entry too long for input filed" error message is displayed when selecting My Works > All Work Assignments.
PK32339	Employee code not encrypted.
PK48827	Actual hours is zero in YTD Actual (Sum) of Monthly Resource Utilization OLAP Pivot.
PK29803	Saving baseline at the project level does not display the correct baseline information at the task level.
PK45624	Financial pivots and reports are incorrect.
PK35926	When check in a task, the "300173 - Element already checked in" error message is displayed.
PK49441	Records associated to a sub-project are not deleted after deleting the master project.
PK29485	Project calendar gaps cause incorrect assignments and push the project dates far into the future.
PK50915	Participant names are not displayed in the Assigned column of the WBS view.
PK50903	Deliverable Responsible cannot be selected for the scope element deliverable.
PK43986	Problem with resources that are being allocated in their non-working time.
PK44176; PK50554	Rational ClearQuest records are orphaned from being imported into Rational Portfolio Manager.
PK50551	RPM CQ Integration mapping profiles are not always persisting after creation.
PK50571	Mapping profile changes are not taking effect as needed to satisfy core usage model when accessing the ClearQuest record from Rational Portfolio Manager.
PK44534	Cannot zero EETC after a leveling from timesheet view on tasks with actual.
PK53251	What-if Timephased budget does not display any data.

Table 12. Customer identified problems fixed in this release (continued)

APAR ID	Description
PK52625	Attributes displayed in previous versions are missing in version 7.1 reports.
PK50876	Problem with API message context cache.
PK50556	Unnecessary selection box presented that creates user confusion when attempting to perform CQ scope element integration.
PK50555	Preventable error message as a result of manually changing project CQ integration 'last synchronized time' results.
PK50570	ClearQuest records in sub-projects in RPM are not recursively synchronized.
PK50552	RPM CQ scope element mapping profile settings are not working correctly.
PK52153	Performance delay in version 7.1.0.0 higher than version 6.2.
PK51602	CQ Last synchronized date/time not updated.
PK52109	RPM V71 DB2 64 bits for AIX - long delay on login.
PK52474; PK54771	State Notification grayed out in version 7.0.5.5.
PK52771	RPM opens workflow description instead of WBS element's description.
PK50832	The Sent Items filter does not update in the Communications view.
PK40058	Errors found in upgrading RPM 7.0.3.3 to 7.0.4.4
PK25920	Migration 6.2.x.x: library file ibmrpm.so needs to be copied.
PK32386	Missing description text in Scorecard Maps and Scorecard Reports.
PK52339	After multi-selecting documents and notes, RPM will automatically disable "Check-out" and "Check-out To" function for documents.
PK51614	Error opening Note/Minutes from the Document portlet.
PK52616	Unhandled exception occurs when double-click notes/minutes in the Document portlet through the Scope Management view.
PK34016	EDatabaseError: 175.16 is not a valid floating when running the "Resource Supply and Demand" Pivot.
PK51899	Custom layout that is supposed to include Doc/Deliv field and/or Doc/WP field in the Document Settings portlet is not showing these fields.
PK49892	Japanese characters are corrupted in RPM 7.1.0.1 installer.

Table 12. Customer identified problems fixed in this release (continued)

APAR ID	Description
PK48879	Cannot recover a typo error when starting a migration to RPM 7.1.
PK49055	Typo in the migration_7100.bat file.
PK45053	Hot Fix should not create dual packages.
PK52593	Middleware does not allow custom ConnectionPooling using INI files.
PK22748	User authentication fails with WAS environment variable.
PK51002	Unhandled error when entering invalid date for Monthly Resource Utilization.
PK41453	Wrong element ID name in the Deliverable Elements pivot.
PK50676	Receiving an error "Resource not found" when right-clicking on a pool and selecting "Add Resource to My Resources" option.
PK47364	State notification is blank after migrating to version 7.0.5.5.
PK42330	Cannot delete the steps for other weeks after checkin for steps once 'submit for approval' is being done before.
PK48033	Timesheet summary notes is limited to 20 characters for Timesheet OLAP Pivots.
PK40158	Changing EETC in the Timesheet view confuses users.
PK52235	Can create new WBS elements outside a proposal (receiving Element ID required)
PK46005; PK55420	Database Error -803 when moving tasks.
PK47017	Tasks and Milestones within Summary Task are not visible anymore.
PK34760	Red cross disappears from My Portal/Work Management view, preventing to return to My Portal view.
PK50896	Project ID starts with 1 instead of with the last Project ID used in the migrated database.
PK23398	The layout settings under the work Package tab cannot be saved.
PK49916	7.1 installation guide has some missing Oracle Information.
PK54964	Leveling Library for Oracle 10g on Suse 9 64 bit is missing.

Known problems

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

Managing the personal and administrative tasks in the TeamMember edition

When you open the **Manage Personal and Administrative Tasks** window in the TeamMember edition and the list does not include any personal or administrative tasks, the browser will stop responding. The workaround for this issue is that Administrators must create an administrative task for those resources that will open the **Manage Personal and Administrative Tasks** window.

Problem with refreshing the Project Resources tab of the Staffing view on Oracle

Selecting more than 10 resources in the Project Resources tab of the Staffing view and clicking the Refresh icon will generate a database error message on Oracle databases. The workaround for this issue is to select fewer than 10 resources at a time.

Multi-select and approve timesheet

The multi-select and approve timesheet feature does not work in this release of Rational Portfolio Manager. The workaround for this issue is to select each individual timesheet and approve.

Lost documents

Deleting a project that has a link to an original document in another project, deletes the original document. There is no workaround for this issue in this release of Rational Portfolio Manager.

Values lost in the Custom Portlet of the Documents description view

Values added to the Custom Portlet of the Documents description view in Resource Management, Assets, and Clients/Cost Centers views are lost after the document description view is reopened. There is no workaround for this issue in this release of Rational Portfolio Manager.

Numeric attributes in saved layouts

The Attributes and Custom Fields bands have been redesigned to improve performance. As a result, if you have a saved layout with numeric attributes columns in your current Rational Portfolio Manager, migrating to version 7.1.1.1 will remove these columns. Note that this impacts only the numeric attributes columns, all other attribute types and custom fields are not impacted.

Status of the Rational Portfolio Manager/Rational ClearQuest resource mapping

The resource mapping in the **Application Administration > ClearQuest Integration > Integration Settings** tab will persist, even though the GUI does not reflect the current mapping. The current status of the resource mapping will be provided as a notification message in a future release.

Dashes disappear on the project assignment level after leveling

When leveling proposals with the start date of one day after the resource assignments, dashes disappear in the proposal staffing view at the project level. There is no workaround for this issue in this release.

Database error when replacing a resource with a profile for the second time

When replacing a resource with a profile twice, the second time, a Database error message is generated. There is no workaround for this issue in this release.

Profile is still displayed after replacing with a resource

When entirely replacing a profile that is affected to a project and assigned at the task level only, the Demand/Supply view shows the profile affected at the project level with no effort. If you replace this profile with another resource, the Staffing view shows the effected resource with no effort. There is no workaround for this issue in this release.

Replacing a profile that is shared between a project and a task

Replacing a profile that is shared between a project and a task, does not work properly. There is no workaround for this issue in this release.

Rational Method Composer template import with dependencies

Dependencies are not imported properly from Rational Method Composer into Rational Portfolio Manager. There is no workaround for this issue in this release.

RPM/PjC trend charts

The ProjectConsole trend charts are not displayed in Rational Portfolio Manager, if you enter the start and end date when creating the chart in Application Administration. The workaround for this issue is not to enter the start and end dates.

Blank drop-down menu in the Icon toolbar

Some of the menu items in the Icon toolbar do not contain the required options. The workaround is to select these options from the menu toolbar or the context menu.

Chapter 3. Migrating to this version

For migration instructions including database, middleware, and common reporting, refer to the *IBM Rational Portfolio Manager Installation and Upgrade Guide* supplied with this release.

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)

Appendix. Notices

This information was developed for products and services offered in the U.S.A. IBM may not offer the products, services, or features discussed in this document in other countries. Consult your local IBM representative for information on the products and services currently available in your area. Any reference to an IBM product, program, or service is not intended to state or imply that only that IBM product, program, or service may be used. Any functionally equivalent product, program, or service that does not infringe any IBM intellectual property right may be used instead. However, it is the user's responsibility to evaluate and verify the operation of any non-IBM product, program, or service.

IBM may have patents or pending patent applications covering subject matter described in this document. The furnishing of this document does not grant you any license to these patents. You can send license inquiries, in writing, to:

IBM Director of Licensing
IBM Corporation North Castle Drive
Armonk, NY 10504-1785
U.S.A.

For license inquiries regarding double-byte (DBCS) information, contact the IBM Intellectual Property Department in your country or send inquiries, in writing, to:

IBM World Trade Asia Corporation Licensing
2-31 Roppongi 3-chome, Minato-ku
Tokyo 106, Japan

The following paragraph does not apply to the United Kingdom or any other country where such provisions are inconsistent with local law:

INTERNATIONAL BUSINESS MACHINES CORPORATION PROVIDES THIS PUBLICATION "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF NON-INFRINGEMENT, MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. Some states do not allow disclaimer of express or implied warranties in certain transactions, therefore, this statement may not apply to you.

This information could include technical inaccuracies or typographical errors. Changes are periodically made to the information herein; these changes will be incorporated in new editions of the publication. IBM may make improvements and/or changes in the product(s) and/or the program(s) described in this publication at any time without notice.

Any references in this information to non-IBM Web sites are provided for convenience only and do not in any manner serve as an endorsement of those Web sites. The materials at those Web sites are not part of the materials for this IBM product and use of those Web sites is at your own risk.

IBM may use or distribute any of the information you supply in any way it believes appropriate without incurring any obligation to you.

Licensees of this program who wish to have information about it for the purpose of enabling: (i) the exchange of information between independently created

programs and other programs (including this one) and (ii) the mutual use of the information which has been exchanged, should contact:

IBM Corporation
Department BCFB
20 Maguire Road
Lexington, MA 02421
U.S.A.

Such information may be available, subject to appropriate terms and conditions, including in some cases, payment of a fee.

The licensed program described in this document and all licensed material available for it are provided by IBM under terms of the IBM Customer Agreement, IBM International Program License Agreement or any equivalent agreement between us.

Any performance data contained herein was determined in a controlled environment. Therefore, the results obtained in other operating environments may vary significantly. Some measurements may have been made on development-level systems and there is no guarantee that these measurements will be the same on generally available systems. Furthermore, some measurement may have been estimated through extrapolation. Actual results may vary. Users of this document should verify the applicable data for their specific environment.

Information concerning non-IBM products was obtained from the suppliers of those products, their published announcements or other publicly available sources. IBM has not tested those products and cannot confirm the accuracy of performance, compatibility or any other claims related to non-IBM products. Questions on the capabilities of non-IBM products should be addressed to the suppliers of those products.

COPYRIGHT LICENSE:

This information contains sample application programs in source language, which illustrates programming techniques on various operating platforms. You may copy, modify, and distribute these sample programs in any form without payment to IBM, for the purposes of developing, using, marketing or distributing application programs conforming to the application programming interface for the operating platform for which the sample programs are written. These examples have not been thoroughly tested under all conditions. IBM, therefore, cannot guarantee or imply reliability, serviceability, or function of these programs. You may copy, modify, and distribute these sample programs in any form without payment to IBM for the purposes of developing, using, marketing, or distributing application programs conforming to IBM's application programming interfaces.

Trademarks

AIX, ClearQuest, DB2, IBM, ProjectConsole, Rational, RequisitePro, SP1, SP2, WebSphere are trademarks of International Business Machines Corporation in the United States, other countries, or both.

Java and all Java-based trademarks and logos are trademarks of Sun Microsystems, Inc. in the United States, other countries, or both.

Microsoft, Windows, Windows NT, and the Windows logo are trademarks of Microsoft Corporation in the United States, other countries, or both.

UNIX is a registered trademark of The Open Group in the United States and other countries.

Linux is a trademark of Linus Torvalds in the United States, other countries, or both.

Other company, product or service names may be trademarks or service marks of others.



Printed in USA

GI11-8310-00

