

CA Clarity™ PPM

Release Notes

Release 13.1.00



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Contact CA Support

For your convenience, CA Technologies provides one site where you can access the information that you need for your Home Office, Small Business, and Enterprise CA Technologies products. At <http://ca.com/support>, you can access the following resources:

- Online and telephone contact information for technical assistance and customer services
- Information about user communities and forums
- Product and documentation downloads
- CA Support policies and guidelines
- Other helpful resources appropriate for your product

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Chapter 1: Welcome to CA Clarity PPM

Welcome to CA Clarity PPM Release 13.1.

This section contains the following topics:

[What This Document Covers](#) (see page 7)

[Training](#) (see page 7)

[International Support](#) (see page 8)

[Knowledge Base Articles](#) (see page 8)

[Known Issues and Resolved Defects](#) (see page 9)

[Add-ins Compatibilities](#) (see page 9)

What This Document Covers

This document provides information about enhanced features, documentation, and system requirements for CA Clarity PPM. This release provides a CA Technologies Bookshelf that you can access from the product. For more information about the bookshelf and product documentation, see [View the CA Technologies Bookshelf](#) (see page 17).

Note: At publication time, the product supports the operating systems and third-party software listed in this document. The most current Release Notes is found on CA Support at <http://ca.com/support>.

Training

For user training, CA Technologies offers the CA Productivity Accelerator (CA PA) solution. You can use this solution to create custom education materials and practice simulations and assessments. The custom education materials are used in classroom training and online simulations. Your users can access the practice simulations and assessments from the Learn link on the User toolbar or from the learning management system (LMS). The CA PA provides standard content modules that you can upload into your CA PA editor and modify to reflect your configuration of CA Clarity PPM. You can also integrate your organization's processes and procedures into the CA PA solution.

CA Education offers these training solutions. To learn more about the training offerings and CA PA, see the CA Education website at <http://ca.com/education>.

International Support

An internationalized product is an English product that operates correctly on local language versions of the required operating system and required third-party products, and supports local language data for input and output. Internationalized products also support the ability to specify local language conventions for date, time, currency and number formats.

A translated product (sometimes referred to as a localized product) is an internationalized product that includes local language support for the user interface of the product, online help and other documentation, and local language default settings for date, time, currency, and number formats.

The product is fully localized and supports over 100 regional settings for date, time, and number formatting. The user interface is available in the following languages:

- Brazilian Portuguese
- Czech
- Danish
- Dutch
- English
- Finnish
- French
- German
- Hungarian
- Italian
- Japanese
- Korean
- Norwegian
- Polish
- Russian
- Simplified Chinese
- Spanish
- Swedish
- Traditional Chinese
- Turkish

Localized versions of some CA Clarity PPM Online Help files and guides are available within 90 days of the product general availability.

The most recent versions of localized product documentation are available at [CA Support](#).

Knowledge Base Articles

For information about knowledge base articles, log in to the [Knowledge Base Articles page](#) on CA Support Online.

Known Issues and Resolved Defects

Known Issues

For information about known issues, log in to [CA Support Online](#) and search using the *clarity13open* keyword. Any related articles and known issues appear.

Note: For the known issues related to the product installation and new features, see the chapter “Installation and Upgrade” in the *Change Impact and Upgrade Guide*.

Resolved Defects

For information about resolved defects, see the [Resolved Defects page](#) on CA Support Online.

Java Runtime Environment Defects

The Java Runtime Environment (JRE) is updated frequently with fixes for security issues, including issues that are unknown at the time CA Clarity PPM is released. To ensure that you have the latest fixes, we recommend that you download the most recent version 7 JDK.

Add-ins Compatibilities

The following list shows the add-ins upgraded for Release 13.1:

- If you are upgrading from Version 13.0 to Release 13.1, the following add-ins are upgraded:

- PMO Accelerator
- CA Clarity PPM Solution Pack of Dashboards and Reports

Note: To see the documentation for this add-in, see the [CA Clarity PPM Solution Pack Index page](#) on CA Support Online.

- Earned Value Manager
- Connector for CA Unicenter Asset Portfolio Management
- Connector for CA Unicenter Service Desk and CA Software Change Manager for Distributed

Chapter 2: New and Enhanced Features

This section contains the following topics:

[New Features](#) (see page 11)

[Enhanced Features](#) (see page 12)

New Features

This release includes the following new features:

- [Financially-Enabled Roles](#) (see page 11)
- [Fixed Header Rows in Grid Portlets](#) (see page 12)
- [WCAG 2.0 Accessibility Support \(Level A\)](#) (see page 12)
- [Budget Merge or Replace](#) (see page 12)

Financially-Enabled Roles

You can assign Resource Class and Transaction Class values to roles. When the team member is a role, these values are used as grouping attributes and are passed to the rate matrix.

If the Staff OBS Unit field on the Team page contains a department or location, you can create cost plans using a combination of Role and Department or Role and Location. If the Staff OBS Unit field does not contain a department or location, there is no change in behavior.

The baseline function is modified to include the new fields.

The following access rights were added for the Financially-Enabled Roles feature:

- Resource – Edit Financial
Controls who can edit the financial properties of roles and resources.
- Resource – Edit General
Controls the ability to edit the general properties of roles and resources, but does not allow access the Financial Properties page.

The XML Open Gateway (XOG) supports these changes.

Fixed Header Rows in Grid Portlets

The column headers on the list views and grids remain visible as a user scrolls down the page. It also works with multiple portlets on a page and pop-ups. This functionality is available for both end-user and administration areas of the product.

WCAG 2.0 Accessibility Support (Level A)

This release of CA Clarity PPM has achieved Level A certification in the WCAG 2.0 Accessibility Standards.

Budget Merge or Replace

Before this release, submitting a cost plan for budget approval could only be done if the structure (grouping attributes and fiscal time period) of the cost plan was identical to that of the approved budget.

In this release, you can do one of the following actions:

- Merge the cost plan being submitted with the currently approved budget (existing functionality). This option is available only when the structures are identical.
- Replace the currently approved budget entirely, regardless of structure (new functionality). This option is available on any cost plan when at least one approved budget exists.

The XML Open Gateway supports these changes.

Enhanced Features

This release includes enhancements to the following features:

- [New Languages Supported in the User Interface](#) (see page 12)
- [Capacity Planning Portlets for Resource Planning](#) (see page 13)

New Languages Supported in the User Interface

The product user interface supports the following new languages:

- Korean
- Simplified Chinese
- Traditional Chinese

Capacity Planning Portlets for Resource Planning

This release includes enhanced Resource Management and Top-Down Planning features. The Resource Planning page includes a new tab layout and two new planning portlets. The new tab layout organizes the portlets for ease of use. As you navigate from left to right, you move from high-level organizational capacity/demand metrics down to detailed booking data.

Note: If you are upgrading, see the *Change Impact and Upgrade Guide* for instructions about upgrading your existing Resource Planning pages and portlets.

The new Resource Planning tabs and portlets are shown in the following table.

Tab	Portlets
Capacity	Role Capacity Histogram Role Capacity
Organizational Demand	OBS Resource Aggregation OBS Investment Aggregation
Top Down Planning	Top Down Planning by Investment
Workloads	Resource Workloads
Allocations	Weekly Detail Allocation Discrepancy
Unfilled Allocations	Unfilled Requirements
Bookings	Booking Status

Note: The *Resource Planning* and *Resource Manager* groups have been updated to include View access rights to the new portlets and the new tabs.

The following table shows the portlets that are available for Resource Planning.

Portlet	Portlet ID	System Provider	Description of Change
Role Capacity Histogram	projmgr.roleCapacityHistogram	Roles with Resource Aggregation	This is a new portlet.
Top Down Planning by Investment	projmgr.topDownPlanning	Team Allocations	This is a new portlet.

Portlet	Portlet ID	System Provider	Description of Change
Role Capacity	projmgr.roleCapacity	Roles with Resource Aggregation	<ul style="list-style-type: none"> ■ Filter: Rearranged the fields and added Resource Type. No fields were removed. ■ Grid: No changes. ■ Aggregation Row: Renamed Variance field to Remaining Capacity.
OBS Resource Aggregation	projmgr.OBSResourceAggregation	OBS Resource Aggregation	<ul style="list-style-type: none"> ■ Filter: Rearranged the fields and changed Resource OBS Type from browse to pull-down. No fields were removed. ■ Grid: No changes.
OBS Investment Aggregation	projmgr.OBSInvestmentAggregation	OBS Investment Aggregation	<ul style="list-style-type: none"> ■ Filter: Rearranged the fields and changed Investment OBS Type from browse to pull-down. No fields were removed. ■ Grid: No changes.
Resource Workloads	projmgr.resourceWorkloads	Resources with Aggregation	<ul style="list-style-type: none"> ■ Filter: Rearranged the fields and changed Employment from single-select pull-down to multi-select browse. No fields were removed. ■ Grid: Changed TSV from displaying six weeks to displaying 10 weeks.
Weekly Detail	projmgr.weeklyDetail	Team Allocations	<ul style="list-style-type: none"> ■ Filter: Rearranged the fields and added Resource and Investment as multi-select browses. Removed Requirement Name, Resource Name, Resource ID, and Investment Name text fields. ■ Grid: Changed TSV to display 10 weeks as numbers (instead of histogram).

Portlet	Portlet ID	System Provider	Description of Change
Allocation Discrepancy	projmgr.allocationDiscrepancy	Actuals vs Allocation Discrepancy	<ul style="list-style-type: none"> ■ Filter: Rearranged the fields. Added Resource and Investment as multi-select browses, Booking Status, and Investment Manager. Removed Resource Full Name, Resource ID, Investment Name, and Investment ID text fields. Added a hidden, required filter for <i>Is Role = No</i> so the portlet only displays resources. ■ Grid: Added the Resource Allocation icon and a link to the right of the Resource column. Reversed the order of Investment Role/Investment Name. Renamed Investment Name to Investment. Renamed Resource Full Name to Resource.
Unfilled Requirements	projmgr.unfilledAllocations	Team Allocations	<ul style="list-style-type: none"> ■ Filter: Rearranged the fields. Added Role and Investment as multi-select browses. Removed Role Name, Role ID, and Investment Name text fields. ■ Grid: Removed the Email icon from the grid because it displays only roles. Roles do not have email addresses.
Booking Status	projmgr.bookingStatus	Team Allocations	<ul style="list-style-type: none"> ■ Filter: Rearranged the fields. Added Resource and Investment as multi-select browses. Removed Requirement Name, Resource Name, Resource ID, and Investment Name text fields. ■ Grid: No changes.

Chapter 3: Documentation

This section contains the following topics:

[View the CA Technologies Bookshelf](#) (see page 17)
[Documentation Changes](#) (see page 18)

View the CA Technologies Bookshelf

The CA Technologies Bookshelf available on the Documentation page of CA Support Online provides the product documentation set in Section 508-compliant HTML format and in PDF format. You can view the CA Technologies Bookshelf online from CA Support Online, or you can download and view the bookshelf locally on your computer.

The CA Technologies Help Bookshelf is installed automatically with the product and provides the core documentation set in HTML format. You can access the Help Bookshelf by clicking the Help link in the product.

To extract the ZIP file and view the CA Technologies Bookshelf

1. Use an archive product such as WinZip.
2. Extract the content to a local folder.
3. Double-click the Bookshelf.html file in the Bookshelf folder.

The CA Technologies Bookshelf opens, and you can use it to view and search the product documentation.

Where to Find Documentation

You can access the product documentation in the following locations:

- Click the Help link in the product.
- The Docs directory on the installation media.
- Technical Support at <http://ca.com/support>.

How to View and Search PDFs

To view PDF files, download and install the Adobe Reader from the Adobe website if it is not already installed on your computer.

If you open a PDF file in Adobe Reader in the CA Technologies Bookshelf and search, the individual PDF file is searched and you see the individual instances of the search term.

Documentation Changes

The CA Clarity PPM documentation has been improved to help you find information faster. The documentation changes include the following improvements:

- **Improved Bookshelves.** The bookshelves provide a single place for you to find helpful product information. On the bookshelves, you will find links to the Release Notes, role-based documentation scenarios, product documentation, implementation information, green books, knowledge base articles, webcasts, videos, social media, educational courses, and other information.

You can find the Release Notes and bookshelves on [CA Support Online](#), and no login is required.

Note: These bookshelves provide a link to new restricted bookshelves that contain content that requires a login to CA Support Online (for example, the Administration Guide, the Technical Reference Guide, and so forth).

- **Role-based Documentation Scenarios.** Role-based documentation scenarios help you complete specific tasks. For example, there are scenarios on how to configure the views for an object, how to customize the Actions Menu, and how to manage authentication. All scenarios are available on the bookshelf using direct links to CA Support Online, and in both HTML and PDF format.
- **Scenarios Guide.** This new guide is provided in both HTML and PDF format.
- The product documentation that does not require a login to CA Support Online is also available through third-party search engines such as Google.
- The *Requirements Planning User Guide* is no longer included in the documentation set.

Appendix A: Compatibilities

This section contains the following topics:

[Compatibilities](#) (see page 19)

[Clients](#) (see page 19)

[Change History](#) (see page 21)

Compatibilities

This appendix contains operating environment information for this release, which is also available from the Compatibilities link on support.ca.com.

Some of the products listed in this appendix are not delivered with CA Clarity PPM, and you must purchase the product. Refer to your licensing agreement for more information.

Clients

The following table shows supported software for client computers accessing CA Clarity PPM.

	Microsoft Windows	Apple Mac OS	Desktop Linux
Operating System	<ul style="list-style-type: none">■ Microsoft Windows XP Professional: SP2 or higher■ Microsoft Windows Vista SP2, all editions■ Microsoft Windows 7 SP1 32-bit and 64-bit, all editions	<ul style="list-style-type: none">■ Mac OS X: Release 10.4 or higher patch level	<ul style="list-style-type: none">■ Any vendor or version with support for browsers listed under the Web Browser section.

	Microsoft Windows	Apple Mac OS	Desktop Linux
Web Browser	<ul style="list-style-type: none"> ■ Internet Explorer 8.0 and higher patch level ■ Internet Explorer 9.0 and higher patch level ■ Firefox 10.0.5 ESR and higher release level²⁾ ■ Firefox 13.0 and higher release level²⁾ ■ Google Chrome 18.0.1025.152m and higher release level²⁾ 	<ul style="list-style-type: none"> ■ Safari: Version 5.1.1 and higher patch level ■ Firefox 10.0.5 ESR and higher release level²⁾ ■ Firefox 13.0 and higher release level²⁾ 	<ul style="list-style-type: none"> ■ Firefox 10.0.5 ESR and higher release level²⁾ ■ Firefox 13.0 and higher release level²⁾
Client Applications¹⁾	<ul style="list-style-type: none"> ■ Microsoft Excel 2007-2010 32-bit, all editions or Microsoft Excel 2003 with 2007 compatibility pack ■ Microsoft PowerPoint 2007-2010 32-bit, all editions ■ Microsoft Project 2007-2010 32-bit, all editions ■ Java 7 Runtime Environment (required for Open Workbench, CA Clarity PPM Microsoft Project interface, and XOG Client): 1.7.0_4 or higher patch level ■ Adobe Flash Player (for viewing Xcelsius dashboards). Version 10 or higher. ■ Acrobat Reader 7.0 or higher (for viewing the product documentation and offline reports) ■ Crystal Reports 2008 Designer Client (required only for custom report development): SP5 or higher level service pack. 	<ul style="list-style-type: none"> ■ Microsoft Office Excel 2011 ■ Adobe Flash Player (for viewing Xcelsius dashboards). Version 10 or higher. ■ Mac OS Preview PDF viewer (for viewing the product documentation) ■ <i>No Microsoft Project support</i> ■ <i>No Open Workbench support</i> ■ <i>No Crystal Report Designer support</i> 	<ul style="list-style-type: none"> ■ Acrobat Reader 7.0 or higher (for viewing the product documentation and offline reports) ■ Adobe Flash Player (for viewing Xcelsius dashboards). Version 10 or higher. ■ <i>No Excel Export support</i> ■ <i>No Microsoft Project support</i> ■ <i>No Open Workbench support</i> ■ <i>No Crystal Report Designer support</i>
Third-party SOAP Integration Toolkits	<ul style="list-style-type: none"> ■ Microsoft Visual Studio 2005 (.NET Framework 2.0) ■ Apache AXIS 1.3 	<ul style="list-style-type: none"> ■ Apache AXIS 1.3 	<ul style="list-style-type: none"> ■ Apache AXIS 1.3

Notes:

- ¹⁾ Using multiple versions of third-party software concurrently are not supported as it can cause out-of-sync and compatibility issues. CA Technologies supports only versions of third-party software that the vendor supports.
- ²⁾ New Firefox and Chrome releases may be supported with minimal testing after being released.

Change History

Changes in CA Clarity PPM Release 13.1.00

Component	Description
Client Browser	<p>Note: CA Technologies only supports browser versions that are supported by their associated third-party vendors.</p> <ul style="list-style-type: none"> ■ Added support for Firefox 10.0.5 ESR and higher release level. ■ Added support for Firefox v13.0 and higher release level. ■ Added support for Chrome v18.0.1.25.152m and higher release level. ■ Dropped support for Firefox v3.5. ■ Dropped support for Firefox v8.0.
Client Applications	<ul style="list-style-type: none"> ■ Added support for Xcelsius Designer 2008 Service Pack 5. ■ Added support for Crystal Reports Designer 2008 Service Pack 5. ■ Dropped support for Xcelsius Designer 2008 Service Pack 3. ■ Dropped support for Crystal Reports Designer 2008 Service Pack 3.

Changes in CA Clarity PPM Service Pack 13.0.01

Component	Description
Client Browser	<ul style="list-style-type: none"> ■ Dropped support for Firefox 8.0. ■ Dropped support for Firefox 3.5. ■ Added support for Firefox 10.0. ■ Added support for Firefox 3.6.

Changes in CA Clarity PPM Release 13.0.00

Component	Description
Client Browser	<ul style="list-style-type: none">■ Dropped support for IE6 and IE7.■ Added support for Firefox 8.0.■ Added support for IE 9.0.■ Added support for Safari 5.1.1.
Client Applications	<ul style="list-style-type: none">■ Dropped support for Microsoft Project 2000, 2002 and 2003.■ Defined support for Crystal Reports Designer 2008 as SP3 or higher (instead of any service pack).
SharePoint Server	<ul style="list-style-type: none">■ Added support for SharePoint Server 2010.■ Dropped support for SharePoint Server 2007.

Appendix B: Accessibility Features

This section contains the following topics:

[Product Enhancements](#) (see page 23)

[Set Up Accessibility for a User](#) (see page 26)

[Keyboard Shortcuts](#) (see page 26)

Product Enhancements

CA Technologies is committed to ensuring all customers can successfully use its products and supporting documentation to accomplish business tasks. Enable the accessibility mode to optimize contrast in the user interface and assist a screen reader for those users who need assistance.

CA Clarity PPM accessibility features are best when used with the Mozilla Firefox 13 browser and the Job Access With Speech (JAWS) screen reader.

CA Clarity PPM inherits accessibility enhancements from Windows-based and Macintosh-based environments in the following areas:

- Display
- Sound
- Keyboard
- Mouse

Note: The information in the following topics applies to Windows-based and Macintosh-based applications. Java applications run on many host operating systems, some of which already have assistive technologies available to them. For these existing assistive technologies to provide access to programs written in JPL, they need a bridge between themselves in their native environments and the Java Accessibility support that is available from within the Java Virtual Machine (Java VM). This bridge has one end in the Java VM and the other on the native operating systems, so it will be slightly different for each platform it bridges to. Oracle is currently developing both the JPL and the Win32 sides of this bridge.

Display

To increase visibility on your computer display, you can adjust the following options:

Font style, color, and size of items

Lets you choose font color, size, and other visual combinations.

Screen resolution

Lets you change the pixel count to enlarge objects on the screen.

Cursor width and blink rate

Lets you make the cursor easier to find or minimize its blinking.

Icon size

Lets you make icons larger for visibility or smaller for increased screen space.

High contrast schemes

Lets you select color combinations that are easier to see.

Sound

Use sound as a visual alternative or to make computer sounds easier to hear or distinguish by adjusting the following options:

Volume

Lets you turn the computer sound up or down.

Text-to-Speech

Lets you hear command options and text read aloud.

Warnings

Lets you display visual warnings.

Notices

Gives you aural or visual cues when accessibility features are enabled or disabled.

Schemes

Lets you associate computer sounds with specific system events.

Captions

Lets you display captions for speech and sounds.

Keyboard

You can make the following keyboard adjustments:

Repeat Rate

Lets you set how quickly a character repeats when a key is pressed.

Tones

Lets you hear tones when pressing certain keys.

Sticky Keys

Lets those who type with one hand or finger choose alternative keyboard layouts.

Mouse

You can use the following options to make your mouse faster and easier to use:

Click Speed

Lets you choose how fast to click the mouse button to make a selection.

Click Lock

Lets you highlight or drag without holding down the mouse button.

Reverse Action

Lets you reverse the functions controlled by the left and right mouse keys.

Blink Rate

Lets you choose how fast the cursor blinks or if it blinks at all.

Pointer Options

Let you do the following:

- Hide the pointer while typing
- Show the location of the pointer
- Set the speed that the pointer moves on the screen
- Choose the pointer's size and color for increased visibility
- Move the pointer to a default location in a dialog box

Set Up Accessibility for a User

Use these steps to set up accessibility for a user.

Follow these steps:

1. Open Administration, and from Organization and Access, click Resources.
2. Click the name of the resource.

The properties page appears.

3. Select the appropriate Accessibility check boxes:

Screen Reader Optimized UI

Determines whether the user interface is optimized so that a screen reader can better recognize the features. Select this check box for any visually impaired user who is using a screen reader.

Default: Cleared

High Contrast Color Mode

Determines whether a specific UI theme to assist color-deficient users is used. If selected, the user sees the High Contrast UI theme.

Default: Cleared

4. Save your changes.
5. (Optional) If you selected the Screen Reader Optimized UI, verify that the screen reader software is running on the user's computer.
6. If the user is logged in to CA Clarity PPM, instruct the user to log out and log back in.

Keyboard Shortcuts

Keyboard Shortcuts for Basic Features

The following table shows the keyboard shortcuts for basic features available on all CA Clarity PPM pages.

Feature	Key Combination
Home Menu	Ctrl+Alt+h
Administration Menu	Ctrl+Alt+a
Favorites Menu	Ctrl+Alt+f

Feature	Key Combination
Back	Ctrl+Alt+b or Alt+Left Arrow
Home Page	Ctrl+Alt+Home
Refresh	Ctrl+Alt+F5
Search	Ctrl+Alt+s
History	Ctrl+Alt+v
Help	F1

Keyboard Shortcuts for CA Clarity PPM Actions

The following table shows keyboard shortcuts for actions on CA Clarity PPM pages.

Action	Key Combination	Alternate Accessibility Key Combination
Activate a field editor (for example, a date picker)	Enter	Alt+Enter
Close a popup	Esc	Shift+Esc
Open a tab menu	Enter	Alt+Enter
Move left, right, up, or down in a menu	Left Arrow Right Arrow Up Arrow Down Arrow	Alt+Up Arrow Alt+Down Arrow Alt+Up Arrow Alt+Down Arrow
Select a highlighted menu item	Enter	Alt+Enter
Open a link in a list page	Ctrl+Enter	
Select or clear a check box Note: Focus must be on the checkbox.	Space Bar	
Expand a hierarchical list Note: Focus must be on the + in the hierarchical list.	Space Bar	

Keyboard Shortcuts for Lists

The following table shows the keyboard shortcuts for lists.

Action	Mode	Keyboard Combination
Switch between edit and display mode in a list	Display, Edit	Enter
Move from cell to cell through a list (grid)	Display	Left Arrow Right Arrow Up Arrow Down Arrow
Move to different areas within a list: portlet icons, column headers, body of list, buttons	Display	Tab (Forward) Shift+Tab (Back)
Switch to display mode	Edit	Esc or Enter
Move left or right within a cell	Edit	Left Arrow Right Arrow
Move from editable cell to editable cell	Edit	Tab (Forward) Shift+Tab (Back)
Open a drop-down list or a date selector	Edit	Enter
Move through selection items in a drop-down	Edit	Up Arrow Down Arrow
Select a highlighted value in a drop-down or a date selector	Edit	Enter
Highlight a date in a date selector	Edit	Down Arrow
Add a new line in a long text area	Edit	Ctrl+Enter

Appendix C: Third-Party Acknowledgements

The license information for third-party utilities and software that CA Clarity PPM uses is available in the \Bookshelf Files\TPSA folder of the CA Technologies Bookshelf.

You can open the license information on the CA Technologies Bookshelf. Click the View TXT link next to Third-Party Acknowledgments.