

CA Clarity™ PPM

PMO Accelerator Release Notes

Release 03.1.00



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Chapter 1: Welcome to PMO Accelerator

Welcome to the CA Clarity PMO Accelerator Release 3.1 add-in (PMO Accelerator) release notes. This add-in is based on CA Clarity Project & Portfolio Manager (CA Clarity PPM) Release 13.1. This document can help you get started with this add-in.

What's New in Release 3.1

The following new features and enhancements are available with this version:

- New Status Report Review page with three new portlets: Status Report Listing, Late Status Reports, and Missing Status Reports.
- New Project Document Review portlet.
- Investments now include four lookup fields for portfolio categorization. These fields are configured to display on the Project Business Alignment properties. The portfolio category fields do not include any values and should be configured to support your categorizations.
- Investments now include the Work Status lookup field. This field is configured to display on the Project Summary properties. The work status field includes the following values: requested, active, on hold, cancelled, or complete.
- Projects now include the Status Reporting lookup. This field is configured to display on the Project Summary properties. The status reporting field determines whether status reports are required on the project and includes the following values: not required, optional, or required.
- Status Reports now include the Report Status lookup field. The field is configured to display on the Status Report General properties. The report status field includes the following values: draft or final.
- Performance improvements in portlet queries.
- Full localization support in 20 languages.

New and Improved Portlets

The following portlets were added or improved in Release 3.1. See the *PMO Accelerator Product Guide* for detailed descriptions of these portlets:

Portlet Name	New	Improved
Actuals by Transaction Type		x
Capital vs Expense Budget and Forecast		x

Portlet Name	New	Improved
Capital vs Expense by Period		x
Capital vs Expense Variance by Period		x
Cost and Effort Performance		x
Cost and Schedule Overview		x
Current Issues		x
Current Issues Listing		x
Earned Value Analysis by Phase		x
Financials		x
Investment Gantt		x
Investments		x
Issue Management		x
Issues by Priority		x
Issues Listing		x
Key Performance Indicators		x
Late Status Reports	x	
Missing Status Reports	x	
Project Analysis		x
Project Baselines		x
Project Document Review	x	
Project Indicators		x
Project KPIs by OBS		x
Project Lifecycle Review		x
Project Manager Cost and Effort Dashboard		x
Project Manager Schedule Dashboard		x
Project Planned Cost		x
Project Schedule		x
Resource Utilization		x
Resource Utilization Percentage by Month		x
Risk Management		x
Schedule and Progress		x

Portlet Name	New	Improved
Status Report Indicators		x
Status Report Listing	x	
Status Report Reviewer Filter	x	
Team Capacity		x

Attribute Overwrite

Attributes installed by the PMO Accelerator in previous versions are overwritten during the upgrade to a higher version of the PMO Accelerator. If you have configured these attributes by renaming them, changing formulas in calculated attributes, or modifying display mappings; then your configurations will be overwritten and you will need to manually redo them after upgrade. These attributes are on the following objects: investment, project, and status report. For the full list of items overwritten upon upgrade, see [Install the Add-In](#) (see page 15).

View Protection

If you previously used Studio to configure PMO Accelerator views, filters, or portlets, these configurations remain as-is. They are not overwritten by new or changed content during installation. You can decide whether to make manual changes to your existing configurations or to apply the new content.

See [Apply the Add-In](#) (see page 18) for information about how to apply the view changes installed by this add-in.

The following table shows all views that were modified in PMO v3.0 and PMO Release 3.1. Use this information to decide whether to make manual changes to your existing views or to apply the new views.

Important! If PMO Release 3.1 is a new installation, versus an upgrade from a prior version of the add-in, you will get all of the views listed in both the PMO v3.0 and PMO Release 3.1 columns. In cases where there is an x in both columns, you will get the view in the PMO Release 3.1 column.

Object Name	View	PMO v3.0	PMO Release 3.1
Application	Application Properties	x	
	Application List	x	

Object Name	View	PMO v3.0	PMO Release 3.1
	Application Filter	x	
Asset	Asset Properties	x	
	Asset List	x	
	Asset Filter	x	
Assignment	Assignment Properties	x	
	Task Assignment List	x	
Baseline	Baseline Revision Properties	x	
	Baseline Revision List	x	
	Baseline Revision Filter	x	
Benefit Plan	Benefit Plan Properties	x	
	Benefit Plan List	x	
	Benefit Plan Filter	x	
Benefit Plan Detail	Benefit Plan Detail Properties	x	
	Benefit Plan Detail List	x	
	Benefit Plan Detail Filter	x	
Cost Plan	Cost Plan Properties	x	x
	Cost Plan List	x	
	Cost Plan Filter	x	
	Budget List	x	
	Budget Filter	x	
Cost Plan Detail	Cost Plan Detail Properties	x	
	Cost Plan Detail List	x	
	Cost Plan Detail Filter	x	
	Budget Plan Detail Filter	x	
GL Allocation	GL Allocation Debits Properties	x	
	Debit Rule List	x	
	Debit Rule Filter	x	x

Object Name	View	PMO v3.0	PMO Release 3.1
	Standard Rule Debits Properties	x	
	Standard Rule List	x	
	Standard Rule Filter	x	
GL Allocation Detail	Overhead Rule Detail Properties	x	
	Overhead Rule Detail List	x	
	Overhead Rule Detail Filter	x	
	Debit Rule Detail List	x	
	Standard Rule Detail List	x	
Idea	Idea Properties	x	
	Idea List	x	
	Idea Filter	x	
Other Work	Other Work Properties	x	
	Other Work List	x	
	Other Work Filter	x	
Portfolio	Portfolio Properties	x	
	Portfolio List	x	
	Portfolio Filter	x	
	Portfolio Child List	x	
	Portfolio Child Filter	x	
Product	Product Properties	x	
	Product List	x	
	Product Filter	x	
Project	Project Properties	x	x
	Project List	x	
	Project Filter	x	
	Program Properties	x	
	Program List	x	
	Program Filter	x	

Object Name	View	PMO v3.0	PMO Release 3.1
	My Projects	x	
	Subproject Selection List	x	
	Subproject Selection Filter	x	
	Project Templates Filter	x	
	Project Release Filter	x	
	Project Requirement Filter	x	
Resource	Resource Labor Properties	x	
	Resource Equipment Properties	x	
	Resource Material Properties	x	
	Resource Expense Properties	x	
	Role Labor Properties	x	
	Role Equipment Properties	x	
	Role Material Properties	x	
	Role Expense Properties	x	
	Resource List	x	
	Resource Filter	x	
	Select Resources List	x	
	Resource Selection List	x	
	Resource Finder List	x	
	Department Resources List	x	
	Select Resources Filter	x	
	Resource Selection Filter	x	
	Resource Finder Filter	x	
	Department Resources Filter	x	
Resource Credit	Resource Credit	x	
	Resource Credit List	x	
	Resource Credit Filter	x	
Resource Credit Detail	Resource Credit Detail List	x	

Object Name	View	PMO v3.0	PMO Release 3.1	
Service	Service Properties	x		
	Service List	x		
	Service Filter	x		
	Service Subscriptions List	x		
	Service Subscriptions Filter	x		
	Service Subscriptions List (Add)	x		
	Service Subscriptions Filter (Add)	x		
Task	Task Properties	x		
	Task List	x		
	Task Filter	x		
	Association Task List	x		
	Gantt List	x		
	Task Resource Utilization List	x		
	Project Requirement Task List	x		
	Select Task List	x		
	Association Task Filter	x		
	Gantt Filter	x		
	Task Resource Utilization Filter	x		
	Team	Staff Member Properties	x	
		Project Team Staff List	x	
Project Team Detail List		x		
Team Staff List (Investments)		x		
Team Detail List (Investments)		x		
Resource Allocations List		x		
Resource Allocations Detail List		x		
Team Selection List		x		

Object Name	View	PMO v3.0	PMO Release 3.1
	Project Team Filter	x	
	Team Filter	x	
	Resource Allocations Filter	x	
	Resource Selection Filter	x	

Reports No Longer Supported

The reports included in the PMO Accelerator have reached end of life and are removed from PMO Accelerator Release 3.1. If you are upgrading from an earlier version of PMO, it is recommended that you use the new versions of the reports delivered in the Clarity Solution Pack and discontinue use of the PMO Accelerator reports.

The following reports have been removed from PMO Accelerator Release 3.1 and are no longer supported:

- Capacity vs Demand By Resource (ID: RPT_PMO_Cap_vs_DemandByRes)
- Capacity vs Demand By Role (ID: RPT_PMO_Cap_vs_DemandByRole)
- Program Schedule Review (ID: RPT_PMO_Prog_Sched_Review)
- Project Storyboard (ID: RPT_PMO_Proj_Storybd)
- Resource Availability (ID: RPT_PMO_Res_Availability)
- Resource Forecasted Utilization (ID: RPT_PMO_Res_Forecast_Util)
- Resource Forecasted Utilization Detail (ID: RPT_PMO_Res_Forcst_Util_Det)

Subobjects and Portlets No Longer Supported

The following subobjects and associated portlets have been removed from PMO Accelerator v3.0 and Release 3.1. If you are upgrading from an earlier version of PMO, you can continue to use these objects and portlets. However, they are no longer supported.

- Program Management Plan subobject
- Project Scope Statement subobject
- Quality Attributes Project subobject
- Project Quality Attributes portlet

Chapter 2: Installation Information

Install the Add-In

Install the PMO Accelerator add-in on your CA Clarity application server so that the content is available to you. See the *CA Clarity PPM Installation Guide* for information about installing the PMO Accelerator add-in.

Before installing the PMO Accelerator add-in, verify that the compatible version of CA Clarity PPM is installed. The PMO Accelerator installation will fail if you do not install the compatible version of CA Clarity PPM prior to installing the add-in.

Important! Review the certified and supported versions chart in the *PMO Accelerator Release Notes* to determine if an upgrade of CA Clarity PPM is required, or optional.

As a best practice, we recommend you back up the existing CA Clarity PPM installation directory and database before installing the add-in.

If you have previously configured the content installed by the PMO Accelerator for the following items, the configurations are not preserved. They are overwritten during installation.

Name	Type	Description
Investment	Object	<p>The installation of this item is forced to guarantee the following attributes and any corresponding display mappings are installed in the Investment object: Architectural Fit, Business Alignment, Business Unit Priority, Commercial Value, Corporate Priority, Portfolio Category 1, Portfolio Category 2, Portfolio Category 3, Portfolio Category 4, Regulatory Compliance, Technology Compliance, and Work Status.</p> <p>It also includes the display mappings of the following attributes installed with CA Clarity PPM: Priority, Progress and Status Indicator.</p> <p>In PMO Release 3.1 the Priority display mappings are modified to display High Priority as green and Low Priority as red.</p>

Name	Type	Description
Project	Object	The installation of this item is forced to guarantee the following attributes and any corresponding display mappings are installed in the Project object: Business Owner, Cost Variance %, Estimating Factor 1, Estimating Factor 2, Finance and Governance, Objective, Project Category, Projected Cost Variance, Projected Cost Variance %, Projected Hours Variance, Projected Hours Variance %, Project Management Office, Project Template, Project Type, Schedule to Baseline, Schedule Variance %, and Status Reporting. It also includes the display mappings of the Risk attribute installed with CA Clarity PPM.
Status Report	Object	The installation of this item is forced to guarantee the entire Status Report object is installed with the PMO Accelerator. Any changes to its attributes and any corresponding display mappings will be overwritten during the installation. It does not include or overwrite the object views.
PMO-Project Status	Page	The installation of this item is forced to guarantee the page layout is installed with the PMO Accelerator and includes the following portlets: Project Indicators, Upcoming Milestones, Project Baselines, Status Report Indicators, Actuals by Transaction Type, and Team Utilization.
Program Schedule Dashboard	Query	The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.
Project Schedule Dashboard	Query	The installation of this item is forced to avoid errors with database schema changes when upgrading the PMO Accelerator from previous versions of the add-in.

Review the Add-In Before Applying

After installing the PMO Accelerator add-in, review the add-in items before applying them.

Follow these steps:

1. Log in to CA Clarity PPM.
2. Open Administration, and from Studio, click Add-ins.

The Add-Ins page appears.

3. Click the Accelerator: Program Management Office add-in (ID: csk).
The Add-In Details page appears.
4. Review the changes to installed add-in items and new add-in items.

See the [Appendix A: PMO v3.0 to Release 3.1 Upgrade](#) (see page 29) for a list of the items updated in PMO Accelerator Release 3.1 and a description of the updates.

If you have previously configured views, the configurations are preserved and are not overwritten during installation. You can decide which new or updated views to apply. Use the details page of the add-in in Studio to select new or modified items and apply them. Applying a Studio object overwrites the existing configuration of the Studio object views.

For more information about how PMO Accelerator configures views, see the *PMO Accelerator Product Guide*.

The Studio Add-In Details page lists all of the items that are included with the add-in. The following fields display on the page:

Name

Indicates the add-in name in a hierarchical relationship determined by dependencies among the items.

Status

Indicates if the add-in item is applied or not in CA Clarity PPM.

Values:

- Not Installed. Items that are new to the add-in version, items that you did not apply from a previous add-in version, or items that produced an error upon install or apply.
- Upgrade Ready. Items that you applied from a previous add-in version that have an update to the item in the current add-in version or views updated via the add-in that you have also modified via Studio.

Important! Consider the configurations you have made to items before applying them. Applying modified items overwrites your configurations.

- Installed. Items that are installed.

Type

Indicates the item type.

Values: Object, Lookup, Page, Tab, Portlet, Query, Custom View, Menu, Group, Project, Process, Role, and Report/Job

ID

Displays the add-in item code, which is the identifier of the add-in item.

Apply the Add-In

Perform the steps described in this section if you have an existing installation of the add-in, or if you have previously configured CA Clarity PPM Studio objects.

Follow these steps:

1. Log in to CA Clarity PPM.
2. Open Administration, and from Studio, click Add-Ins.
The Add-Ins page appears.
3. Click the Accelerator: Program Management Office add-in (ID: csk).
The Add-In Details page appears.
4. Review the items in the list and select the items that are “Upgrade Ready” or “Not Installed.”

Note: By default, when you upgrade to the current add-in version, the items that are new or modified are pre-selected. If you do not want to apply all items, from the Add-In Details page, unselect all pre-selected items by clicking in the box at the top of the page to the left of the Name column heading one time to select all items and a second time to unselect all items. After that select the items you want to apply. Selected items with dependency on other items are also selected.

For a list of the items updated in PMO Accelerator Release 3.1 and a description of the updates, see the *PMO Accelerator Release Notes*.

5. (Upgrade Only) For all active process instances with the "Upgrade Ready" status, cancel and delete the process instance.

Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

6. Click Apply.

Note: Selected items with dependencies on other items are also updated.

A list of updated items displays on the confirmation or install page.

7. Click Yes to update or install the items.

If a user has previously changed an item listed on the confirmation or install page, publish the item before displaying the update to the users.

See the *Studio Developer's Guide* for more information.

CA Best Practices Accelerator

As of PMO Accelerator v2.0, the PMO Accelerator add-in includes portlets, processes, subobjects, and templates that you may already have if the Best Practices Accelerator (BPA) was previously installed. If you are upgrading from PMO Accelerator v1.3, and you have the BPA installed, refer to the *Upgrading from Clarity's Best Practices Accelerator to PMO Accelerator v2.1* document for details on how to manage your upgrade to PMO Accelerator Release 3.1.

Chapter 3: Certified and Supported Versions

Only the following PMO Accelerator and CA Clarity PPM combinations are certified and supported. Use this table to check that you have the correct PMO Accelerator and Clarity combination:

CA Clarity Version	Add-In Version
13.1	3.1
13.0	3.0
12.1	2.2
8.1.5/CA Clarity PPM v12.0.6	2.1.1
8.1.5/CA Clarity PPM v12.0.5	2.1
8.1.5	2.0
8.1 Service Pack 2	1.3
8.1.1	1.2

Important! The upgrade from PMO v1.2 to PMO v3.0 is not a valid upgrade path. If you have PMO v1.2 installed, you must upgrade to PMO Release 3.1.

Chapter 4: Localization

The user interface is available in the following supported languages:

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

The most recent editions of localized documentation are available online from the Documentation link on [CA Support](#).

Chapter 5: Documentation

The *PMO Accelerator Product Guide* contains product overview and installation information. The guide also includes detailed processes and procedures on how to use the add-in.

The most recent version of the PMO Accelerator Product Guide and Release Notes are available from the Documentation page on [CA Support](#). Visit this website periodically for the latest editions of the documentation.

Chapter 6: Additional Resources

Known Issues

For information on known issues, visit [CA Support Online](#) and search the keyword: *pmo3open*. Any related articles and known issues are displayed.

Contacting Technical Support

For online technical assistance and a complete list of locations, primary service hours, and telephone numbers, contact CA Support.

Web address:

<http://www.support.ca.com>

Telephone numbers:

North America: 1 888 550 6458

Europe: 44 08459 888788

Asia Pacific: 61 3 9821 3000

Appendix A: PMO v3.0 to Release 3.1 Upgrade

If you have PMO v3.0 installed and you upgrade to PMO Release 3.1, the Add-in Details page shows which items are not applied. Their status will display as Upgrade Ready. In many cases, the reason why an item shows as Upgrade Ready is because there is an update to the item included in the new add-in version.

The following table shows a scenario where PMO v3.0 was fully installed and applied, including all custom views, and it was upgraded to PMO Release 3.1. The order of the items in the table reflects the same order displayed in the Add-in Details page. Items with more than one dependency are duplicated in the table, also reflecting how they display in the Add-in Details page.

Important! You should review the table because it explains the recommended actions for applying the add-in items with an Upgrade Ready status. It identifies whether it is strongly recommended, recommended, or optional for you to apply the updates.

The following fields display in the table:

Name

Indicates the item name and is the same as the name in the Add-in Details page.

Type

Indicates the item type and is the same as the type in the Add-in Details page.

Values: Object, Lookup, Page, Tab, Portlet, Query, Custom View, Menu, Group, Project, Process, Role, and Report/Job

Description

Describes the update and provides a short explanation of why you should apply it.

Action

Indicates the action that should be taken on the item.

Values:

- SR - The update is strongly recommended. It must be applied.
- R - The update is recommended. It should be applied.
- O - The update is optional. We recommend you apply the update unless you have modified custom views or items and do not want your modifications overwritten.

Important! Consider the configurations you have made to items before applying them. Applying modified items overwrites your configurations.

Name	Type	Description	Action
ODF.NSQL.COP.PRJ PENDINGESTIMATES.RECOMMEND_CHANNEL GE_ETC_HRS_S L	Lookup	The display mapping descriptions for the Increase/Decrease in ETC column, in the Pending Estimates Review portlet, were incorrect. They are fixed to display "Decrease in ETC" for a green stoplight and "Increase in ETC" for a red stoplight.	SR
Current Issues Listing	Query	Performance improvements. The query is accessing different tables to achieve the same results with better performance.	SR
Issues Listing	Query	Performance improvements. The query is accessing different tables to achieve the same results with better performance.	SR
Overview	Page	The Issues and Risks tab, that is part of the Overview page, is modified to display the Issue Management portlet maximized. Because of this change to one of its tabs, the Overview page shows as Upgrade Ready.	O
General	Tab	The Issues and Risks tab, that is part of the Overview page, is modified to display the Issue Management portlet maximized. The General tab shows as Upgrade Ready because of this change to one of the Overview page tabs.	O
Sponsor	Tab	The Issues and Risks tab, that is part of the Overview page, was modified to display the Issue Management portlet maximized. The Sponsor tab shows as Upgrade Ready because of this change to one of the Overview page tabs.	O
Project KPIs by OBS	Query	The query does not produce duplicate dimensional data anymore when associating a project to the top level of the OBS.	SR
Project Schedule	Portlet	No changes in functionality. In Clarity v13.1 an internal field (class code) was removed. As a consequence, the removal from this portlet is also required.	R

Name	Type	Description	Action
Project Planned Cost	Portlet	No changes in functionality. In Clarity v13.1 an internal field (class code) was removed. As a consequence, the removal from this portlet is also required.	R
Portfolio Dashboard	Tab	The Issues and Risks tab, that is part of the Overview page, was modified to display the Issue Management portlet maximized. The Portfolio Dashboard tab shows as Upgrade Ready because of this change to one of the Overview page tabs.	O
Program Dashboard	Tab	The Issues and Risks tab, that is part of the Overview page, was modified to display the Issue Management portlet maximized. The Program Dashboard tab shows as Upgrade Ready because of this change to one of the Overview page tabs.	O
ODF.NSQL.COP.PROGRAMSCHE DULEDASHBOARD.SCHEDULE_ SL	Lookup	The display mapping descriptions for the Schedule column, in the Program Schedule Dashboard portlet, were incorrect. They are fixed to display Days instead of %.	SR
PM Alerts	Tab	The Issues and Risks tab, that is part of the Overview page, was modified to display the Issue Management portlet maximized. The PM Alerts tab shows as Upgrade Ready because of this change to one of the Overview page tabs.	O
Current Issues	Query	Performance improvements. The query is accessing different tables to achieve the same results with better performance.	SR
Project Manager Schedule Dashboard	Portlet	The portlet now displays the Open for Time Entry column as an image and the % Complete column is right aligned. These are configurable columns that are not displayed in the default layout.	R
Project Manager Cost and Effort Dashboard	Portlet	The portlet now includes the Subproject icon column, indicating if the project is a subproject.	R
Issues and Risks	Tab	The Issue Management portlet is now displaying maximized on this tab, R for performance reasons, instead of displaying above the Risk Management portlet. Both portlets are still available and can be selected from the drop-down list.	R
Risk Management	Query	Performance improvements. The query is accessing different tables to achieve the same results with better performance.	SR
Issue Management	Query	Performance improvements. The query is accessing different tables to achieve the same results with better performance.	SR

Name	Type	Description	Action
Investments	Portlet	Portfolio portlet is now configured to sort results first by the approved status (Approved Flag), in descending order, and second by the investment name, in ascending order.	R
Financials	Portlet	Portfolio portlet is now configured to sort results first by the approved status (Approved Flag), in descending order, and second by the investment name, in ascending order.	R
Investment Gantt	Portlet	Portfolio portlet is now configured to sort results first by the approved status (Approved Flag), in descending order, and second by the investment name, in ascending order.	R
Capital vs Expense Variance by Period	Portlet	Portfolio portlet is now configured to sort results first by the approved status (Approved Flag), in descending order, and second by the investment name, in ascending order.	R
Capital vs Expense by Period	Query	Performance improvements. The query was rewritten and is accessing new database views to achieve the same results with better performance.	SR
Portlet Fiscal Period Type	Lookup	In order to apply the Capital vs Expense by Period query, you also need to apply the Portlet Fiscal Period Type lookup. This is required because there is a dependency between the query and the lookup. Also, the lookup now includes a new value - 13 Periods - which can be selected as an option in the Period Type filter available in the Capital vs Expense Variance by Period portlets.	SR
Capital vs Expense Budget and Forecast	Portlet	Portfolio portlet is now configured to sort results first by the approved status (Approved Flag), in descending order, and second by the investment name, in ascending order. Also, the Budget to Forecast Var (Capital), Budget to Forecast Var (Expense), and Budget to Forecast Var (Total) columns are now displaying values instead of stoplight images.	R
Capital vs Expense Budget and Forecast	Query	Performance improvements. The query was rewritten and is accessing new database views to achieve the same results with better performance.	SR
Capital vs Expense by Period	Portlet	Portfolio portlet is now configured to sort results first by the approved status (Approved Flag), in descending order, and second by the investment name, in ascending order.	R
Capital vs Expense by Period	Query	Performance improvements. The query was rewritten and is accessing new database views to achieve the same results with better performance.	SR

Name	Type	Description	Action
Portlet Fiscal Period Type	Lookup	In order to apply the Capital vs Expense by Period query, you also need to apply the Portlet Fiscal Period Type lookup. This is required because there is a dependency between the query and the lookup. Also, the lookup now includes a new value - 13 Periods - which can be selected as an option in the Period Type filter available in the Capital vs Expense by Period portlet.	SR
Key Performance Indicators	Portlet	Portfolio portlet is now configured to sort results first by the approved status (Approved Flag), in descending order, and second by the investment name, in ascending order.	R
Cost and Effort Performance	Portlet	Portfolio portlet is now configured to sort results first by the approved status (Approved Flag), in descending order, and second by the investment name, in ascending order.	R
Cost and Schedule Overview	Query	Performance improvements. The query is accessing different tables to achieve the same results with better performance.	SR
Schedule and Progress	Query	The query now includes projects with a status of Resumed when you filter projects by Approved status, consistent with other Clarity filters.	SR
Investment Resource Utilization	Query	Performance improvements. Also, the query now includes projects with a status of Resumed when you filter projects by Approved status, consistent with other Clarity filters.	SR
Project Indicators	Query	Performance improvements. The query is accessing different tables to achieve the same results with better performance.	SR
Status Report Indicators	Query	OBS filter is now using the OBS Projects Filter Browse that lists OBS units associated with projects, instead of the OBS Filter Browse that lists all OBS units. It also includes changes to the Active, Template, and Program filter options. They are now associated to the Portlet Yes or No lookup.	SR
Actuals by Transaction Type	Query	Performance improvements. The query also includes fixes for the subtotal calculations at the resource level and shows data for project IDs containing lower case characters.	SR
Project Baselines	Query	Performance improvements.	SR
Team Capacity	Query	Performance improvements.	SR
Issues by Priority	Query	Performance improvements. The query is accessing different tables to achieve the same results with better performance.	SR
Earned Value Analysis by Phase	Portlet	Planned Value (BCWS), Earned Value (BCWP), Actual Cost (ACWP), and Cost Variance (CV) columns are now formatted to show two decimal places.	R

Name	Type	Description	Action
Earned Value Analysis by Phase	Query	The query includes changes to the Active, Template and Program filter options. They are now associated to the Portlet Yes or No lookup.	SR
Project Analysis	Query	Performance improvements.	SR
Investment Resource Utilization	Query	Performance improvements. Also, the query now includes projects with a status of Resumed when you filter projects by Approved status, consistent with other Clarity filters.	SR
Project Lifecycle Review	Portlet	Portlet is now configured to sort results by phase WBS sequence.	R
Project Lifecycle Review	Query	The query now shows green stoplights when a phase exists in the project and it is not late.	SR
Cost Plan Object Properties View	Custom View	In Clarity v13.1, when you submit a financial plan to create a budget plan, there is new Submit Option available that allows you to merge or replace a budget plan previously created. This view now includes the Submit Option field.	SR
GL Allocation Object - Debit Rules Filter View	Custom View	This view was displaying User Value 1 twice. It is fixed to display User Value 1 and User Value 2.	SR
Project Object Properties View	Custom View	The Project Summary and Business Alignment subpages are modified. The Project Summary subpage includes the new Work Status and Status Reporting lookup fields. The Business Alignment subpage includes the four new portfolio categorization lookup fields.	SR
Status Report Subobject List View	Custom View	The Status Report subobject now includes the Report Status field to identify if the status report is a draft or final version. The list view is modified to include the Report Status field.	SR
Status Report Subobject Filter View	Custom View	The Status Report subobject now includes the Report Status field to identify if the status report is a draft or final version. The filter view is modified to include the Report Status field.	SR
Status Report Subobject Properties View	Custom View	The Status Report subobject now includes the Report Status field to identify if the status report is a draft or final version. The properties view is modified to include the Report Status field.	SR