

# CA Clarity™ PPM

## PMO Accelerator Release Notes - On Demand

Release 03.2.00



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# Chapter 1: Welcome to PMO Accelerator

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Welcome to the CA Clarity PMO Accelerator Release 3.2 add-in (PMO Accelerator) release notes. This add-in is based on CA Clarity Project & Portfolio Manager (CA Clarity PPM) Release 13.2. This document can help you get started with this add-in.

## What's New in Release 3.2

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

- New Portfolio Dashboard page available in the menu. This page has fifteen new portlets all based on the new portfolio providers: Portfolio Costs, Portfolio Cost and Benefit Analysis, Portfolio Roles, Portfolio Role Analysis, Portfolio Cost by Overall Health, Portfolio Investment Count by Goal, Portfolio Planned Cost by Goal, Portfolio Role Demand by Goal, Portfolio Planned NPV by Goal, Portfolio Investment Count by Type, Portfolio Investment Count by Work Status, Portfolio Investment Count by Waterline, Portfolio Investment Count by Approval, Portfolio Capital and Operating Costs, and Portfolio Capital and Operating Cost Analysis.
- New PMO-Portfolio Investment Dashboard page available to select as a dashboard view on portfolios. This page has ten new portlets all based on the new portfolio providers: Planned Cost by Waterline, Role Demand by Waterline, Investment Cost and Role Demand, Investment Schedule, Role Capacity and Demand, Investment Planning by Period, Investment Cost by Period, and Investment Financial Summary, Capital and Operating Cost Summary, and Capital and Operating Budget vs. Forecast. Also, three new additional portlets are available to add adding by configuration: Planned Cost by Goal, Role Demand by Goal, and Role Capacity and Demand Histogram.
- Investment views configured to display the new cost fields introduced in the CA Clarity PPM Release 13.2: Planned Capital Cost, Planned Capital Cost %, Planned Operating Cost, Planned Operating Cost %, Budgeted Capital Cost, Budgeted Capital Cost %, Budgeted Operating Cost, Budgeted Operating Cost %, and Cost Type.
- Investment views configured to display the Work Status lookup field introduced in the PMO Accelerator Release 3.1. This field is configured to display on the summary properties page of investments. The Work Status field includes the following values: requested, active, on hold, canceled, or complete.
- Project view configured to display the Prevent Unassigned Timesheet Tasks check box field introduced in the CA Clarity PPM Release 13.1. This field is configured to display on the Settings properties page of projects.
- Task views configured to display the new Cost Type field introduced in the CA Clarity PPM Release 13.2. This field is configured to display on the Settings properties page of tasks.
- Cost Plan Detail views configured to display the new Cost Type field introduced in the CA Clarity PPM Release 13.2. This field is configured to display on the properties, filters, and lists of the cost plan and budget details.
- Risk, Issue, and Change Request views redesigned.
- Portlets and list views redesigned to simplify the navigation to property and dashboard pages by including a new dashboard icon, when appropriate.
- New My Timesheets portlet.
- Performance improvements in portlet queries.

- New access groups that include the access rights available with CA Clarity PPM Release 13.2: PMO Executive Viewer, PMO Executive Viewer Extended, PMO Financial Administrator, PMO Idea Creator, PMO Idea Reviewer, PMO Investment Creator, PMO Investment Viewer Extended, PMO Portfolio Manager, PMO Program Manager, PMO Project Creator, PMO Project Manager, PMO Project Manager Extended, PMO Project Viewer, PMO Resource Administrator, PMO Resource Manager, PMO Resource Manager Extended, PMO System Administrator, PMO Team Member, PMO Timesheet Administrator, and PMO Vendor Management.
- New sample data included in the add-in as an optional installment in non-production environments. The sample data has been extensively updated in this release to reflect the sales dataset used in product demonstrations. The sample data populates the add-in pages, portlets, and views in a test or development environment.
- Full localization support in 18 languages.

## New and Improved Portlets

The following portlets were added or improved in Release 3.2. See the *PMO Accelerator Product Guide* for detailed descriptions of these portlets:

Portlet Name	New	Improved
Actuals by Transaction Type		x
Capital and Operating Budget vs. Forecast	x	
Capital and Operating Cost Summary	x	
Cost and Schedule Overview		x
Current Issues Listing		x
Investment Cost and Role Demand	x	
Investment Cost by Period	x	
Investment Financial Summary	x	
Investment Planning by Period	x	
Investment Schedule	x	
Issue Management		x
Milestones		x
My Timesheets	x	
Pending Estimates Review		x
Planned Cost by Goal	x	

<b>Portlet Name</b>	<b>New</b>	<b>Improved</b>
Planned Cost by Project Type (Project Planned Cost)		x
Planned Cost by Waterline	x	
Portfolio Capital and Operating Cost Analysis	x	
Portfolio Capital and Operating Costs	x	
Portfolio Cost and Benefit Analysis	x	
Portfolio Cost by Overall Health	x	
Portfolio Costs	x	
Portfolio Dashboard Filter	x	
Portfolio Investment Count by Approval	x	
Portfolio Investment Count by Goal	x	
Portfolio Investment Count by Type	x	
Portfolio Investment Count by Waterline	x	
Portfolio Investment Count by Work Status	x	
Portfolio Investment Dashboard Filter	x	
Portfolio Planned Cost by Goal	x	
Portfolio Planned NPV by Goal	x	
Portfolio Role Analysis	x	
Portfolio Role Demand by Goal	x	
Portfolio Roles	x	
Posted Transaction Review		x
Program Manager Cost Dashboard		x
Program Manager Schedule Dashboard		x
Project Costs by Phase		x
Project Costs by Resource		x
Project Costs by Task		x
Project Lifecycle Review		x
Project Manager Cost and Effort Dashboard		x
Project Schedule		x
Project KPIs by OBS		x

Portlet Name	New	Improved
Role Capacity and Demand	x	
Role Capacity and Demand Histogram	x	
Role Demand by Goal	x	
Role Demand by Waterline	x	
Risk Management		x
Schedule and Progress		x
Schedule Performance Details		x
Staffing Details		x
Team Member Organizer		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 [Add-In Items Automatically Applied](#) (see page 21).

## 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 Items](#) (see page 29) 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, PMO Release 3.1, and PMO Release 3.2. Use this information to decide whether to make manual changes to your existing views or to apply the new views.

**Important!** If PMO Release 3.2 is a new installation, versus an upgrade from a prior version of the add-in, you will get all of the views listed in the PMO v3.0, PMO Release 3.1, and PMO Release 3.2 columns. In cases where there is an x in more than one column, you will get the view from the latest release.

Object Name	View	PMO v3.0	PMO Release 3.1	PMO Release 3.2
Application	Application Properties	x		x
	Application List	x		x
	Application Filter	x		
Asset	Asset Properties	x		x
	Asset List	x		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		

<b>Object Name</b>	<b>View</b>	<b>PMO v3.0</b>	<b>PMO Release 3.1</b>	<b>PMO Release 3.2</b>
	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		
Change	Change Properties			x
	Change List			x
	Change Filter			x
Cost Plan	Cost Plan Properties	x	x	x
	Cost Plan List	x		
	Cost Plan Filter	x		
	Budget List	x		
	Budget Filter	x		
Cost Plan Detail	Cost Plan Detail Properties	x		x
	Cost Plan Detail List	x		x
	Cost Plan Detail Filter	x		x
	Budget Plan Detail Filter	x		x
GL Allocation	GL Allocation Debits Properties	x		
	Debit Rule List	x		
	Debit Rule Filter	x	x	
	Standard Rule Debits Properties	x		
	Standard Rule List	x		
	Standard Rule Filter	x		
GL Allocation Detail	Overhead Rule Detail Properties	x		

Object Name	View	PMO v3.0	PMO Release 3.1	PMO Release 3.2
	Overhead Rule Detail List	x		
	Overhead Rule Detail Filter	x		
	Debit Rule Detail List	x		
	Standard Rule Detail List	x		
Idea	Idea Properties	x		x
	Idea List	x		x
	Idea Filter	x		
Issue	Issue Properties			x
	Issue List			x
	Issue Filter			x
	Associated Issues List			x
Other Work	Other Work Properties	x		x
	Other Work List	x		x
	Other Work Filter	x		
Portfolio	Portfolio Properties	x		Removed
	Portfolio List	x		Removed
	Portfolio Filter	x		Removed
	Portfolio Child List	x		Removed
	Portfolio Child Filter	x		Removed
Product	Product Properties	x		x
	Product List	x		x
	Product Filter	x		
Project	Project Properties	x	x	x
	Project List	x		x
	Project Filter	x		
	Program Properties	x		x

Object Name	View	PMO v3.0	PMO Release 3.1	PMO Release 3.2
	Program List	x		x
	Program Filter	x		
	My Projects	x		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		

Object Name	View	PMO v3.0	PMO Release 3.1	PMO Release 3.2
	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		
Risk	Risk Properties			x
	Risk List			x
	Risk Filter			x
	Associated Risks List			x
Service	Service Properties	x		x
	Service List	x		x
	Service Filter	x		
	Service Subscriptions List	x		
	Service Subscriptions Filter	x		
	Service Subscriptions List (Add)	x		

Object Name	View	PMO v3.0	PMO Release 3.1	PMO Release 3.2
	Service Subscriptions Filter (Add)	x		
Status Report	Status Report Properties	x	x	x
	Status Report List	x	x	
	Status Report Filter	x	x	
Task	Task Properties	x		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		

Object Name	View	PMO v3.0	PMO Release 3.1	PMO Release 3.2
	Resource Allocations List	x		
	Resource Allocations Detail List	x		
	Team Selection List	x		
	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 and Release 3.2. 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 Release 3.2. They 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, Release 3.1, and Release 3.2. 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

The old portfolio feature has been replaced by a new portfolio feature in CA Clarity PPM Release 13.2. The PMO Accelerator Release 3.2 has new portfolio portlets based on the new portfolio feature. Therefore, the old portfolio portlets based on the old portfolio feature have been removed.

The following pages and portlets have been removed from the PMO Accelerator Release 3.2:

- Portfolio Dashboard tab (Overview page)
  - My Portfolios portlet
  - Portfolio Benefits and Costs portlet
  - Portfolio Investment Benefits by Goal portlet
- PMO Portfolio Layout
- Scorecard tab
  - Balance portlet
  - Investments portlet
  - Financials portlet
- Comparison tab
  - Prioritization of Investments [--Base Scenario--] portlet
  - Resource Demand on Investments [--Base Scenario--] portlet
  - Prioritization of Investments [--Compare To Scenario--] portlet
  - Resource Demand on Investments [--Compare To Scenario--] portlet
- Capacity Tab
  - Investment Gantt portlet
  - Portfolio Role Capacity and Demand portlet
- Resources tab
  - Resource Allocation portlet

- Resource Capacity and Allocation portlet
- Financials tab
  - Capital vs Expense Budget and Forecast portlet
  - Capital vs Expense By Period portlet
  - Capital vs Expense Variance By Period portlet
- Performance tab
  - Key Performance Indicators portlet
  - Cost and Effort Performance portlet

## Access Groups No Longer Supported

The PMO Accelerator Release 3.2 includes new access groups. If you are upgrading from an earlier version of PMO, it is recommended that you use the new access groups and discontinue use of the old access groups that shipped in previous releases.

The following access groups have been removed from PMO Accelerator Release 3.2 and are no longer supported:

- PMO Accelerator Business Sponsor Group (ID: csk.BusinessSponsor)
- PMO Accelerator Portfolio Manager Group (ID: csk.PortfolioManager)
- PMO Accelerator Program Manager Group (ID: csk.ProgramManager)
- PMO Accelerator Project Manager Group (ID: csk.ProjectManager)
- PMO Accelerator Team Member Group (ID: csk.TeamMember)

# Chapter 2: Review and Apply the Add-In

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## Add-In Items Automatically Applied

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, BTM Integration, 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: 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. In PMO Release 3.2, the Priority display mappings were removed from the PMO Accelerator and are now installed with CA Clarity PPM following the same rules.</p>
Project	Object	<p>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 Effort Variance, Projected Effort Variance %, Project Management Office, Project Template, Project Type, Schedule to Baseline, Schedule Variance %, and Status Reporting.</p> <p>It also includes the display mappings of the Risk attribute installed with CA Clarity PPM.</p>
Status Report	Object	<p>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.</p>

Name	Type	Description
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.
Actuals by Transaction Type	Portlet	<p>The installation of this item is forced to guarantee that the portlet reflects the changes made to its query provider. The query provider changes were made to improve performance. As a result of these a result of these performance improvements, the following columns are no longer available in portlet configuration: Amount Remaining, Billing, Charge Code, Date Entered, Investment Object Code, Project, Project Department, Project Entity, Project ID, Project Internal ID, Project Location, Resource Department, Resource Entity, Resource Internal ID, Resource Location, Task Internal ID, Transaction Class, Transaction Internal ID, Transaction Type, and WBS Sequence. The aggregation row was also removed.</p> <p>The portlet was improved so it now supports exporting the detail rows to Excel.</p> <p>The portlet has two placeholder columns that appear in the grid following the Transaction/Resource/Date column. These placeholder columns do not display any data unless the portlet is exported to Excel. If the portlet is exported to Excel, the resource name and transaction date display in the placeholder columns.</p>
Cost and Schedule Overview	Portlet	The installation of this item is forced to guarantee that the portlet reflects the changes made to its query provider. The Properties icon was replaced by the Dashboard icon and it links to the project dashboard. The Project column now links to the project properties page. The Planned Capital Cost, Planned Capital %, Planned Operating Cost, and Planned Operating % columns are available for adding by configuration to this portlet. The Actual Cost column was renamed to Actual Cost (ACWP).
Posted Transaction Review	Portlet	<p>The installation of this item is forced to guarantee that the portlet reflects the changes made to its query provider. The Cost Type (column and filter) and the Entry Number (filter only) are available for adding by configuration to this portlet. The portlet does not show results without filtering and the Investment filter is now required.</p> <p><b>Note:</b> This portlet is available from the Posted Transaction Review page in the menu.</p>

Name	Type	Description
Posted Transaction Review	Portlet	The installation of this item is forced to guarantee that the portlet reflects the changes made to its query provider. The Cost Type (column and filter) and the Entry Number (filter only) are available for adding by configuration to this portlet.  <b>Note:</b> This portlet is available as a cost plan detail object action.
Program Manager Cost Dashboard	Portlet	The installation of this item is forced to guarantee that the portlet reflects the changes made to its query provider. The Properties icon was replaced by the Dashboard icon and it links to the project dashboard. The Project column now links to the project properties page. The Planned Capital Cost, Planned Capital %, Planned Operating Cost, and Planned Operating % columns are available for adding by configuration to this portlet. The Actual Cost column was renamed to Actual Cost (ACWP).
Schedule and Progress	Portlet	The installation of this item is forced to guarantee that the portlet reflects the changes made to its query provider. The Planned Capital Cost and Planned Operating Cost metrics are available for adding by configuration to this portlet.
Team Member Task Summary	Portlet	The installation of this item is forced to guarantee that the portlet reflects the changes made to its query provider. The Properties icon was replaced by the Dashboard icon and it links to the project dashboard. The Project column now links to the project properties page. The portlet now displays the guidelines icon if the task has a valid URL as a guideline or a guideline is set up for the site.
Actuals by Transaction Type	Query	Performance improvements were made to this query provider. As a result of these performance improvements, the following columns were removed from the query: Amount Remaining, Billing, Charge Code, Date Entered, Investment Object Code, Project, Project Department, Project Entity, Project ID, Project Internal ID, Project Location, Resource Department, Resource Entity, Resource Internal ID, Resource Location, Task Internal ID, Transaction Class, Transaction Internal ID, Transaction Type, WBS Sequence. Also, the query was improved so it now supports exporting the detail rows to Excel.
Cost and Schedule Overview	Query	The query now includes the new cost columns: Planned Capital Cost, Planned Capital %, Planned Operating Cost, and Planned Operating %. Also, the Actual Cost column was renamed to Actual Cost (ACWP).

<b>Name</b>	<b>Type</b>	<b>Description</b>
Current Issues	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.
Current Issues Listing	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.
Earned Value Analysis by Phase	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.
Investment Resource Utilization	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.
Investment Timesheet Review	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.
Investment Timesheet Summary	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.
Issue Management	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.
Issues By Priority	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.
Issues Listing	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.
Late Status Reports	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.
Late Tasks and Milestones	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.
Milestones	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.
Missing Status Reports	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.

Name	Type	Description
Pending Estimates	Query	The query is modified to only include pending ETC that is set to a value. If pending ETC is NULL (no value entered), then it will not be included in the query results.
Process Bottlenecks	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.
Program Manager Cost Dashboard	Query	The query now includes the new cost columns: Planned Capital Cost, Planned Capital %, Planned Operating Cost, and Planned Operating %. Also, the Actual Cost column was renamed to Actual Cost (ACWP).
Program Manager 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 Analysis	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 Baselines	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 Costs by Phase	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. Also, the Actual Cost column was renamed to Actual Cost (ACWP).
Project Costs By Resource	Query	The Actual Cost column was renamed to Actual Cost (ACWP).
Project Costs By Task	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. Also, the Actual Cost column was renamed to Actual Cost (ACWP).
Project Cycle Time Analysis Query	Query	The query does not produce duplicate dimensional data anymore when the work breakdown structure has several levels, including phases and tasks.
Project Document Review	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 Indicators	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.

<b>Name</b>	<b>Type</b>	<b>Description</b>
Project KPIs By OBS	Query	The Project Details column was renamed to Project Dashboard. The mapping was changed from the Side Arrow Neutral icon to the Dashboard icon.
Project Life Cycle Review	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 Manager 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.
Risk Management	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.
Schedule and Progress	Query	The query now includes the new cost columns: Planned Capital Cost and Planned Operating Cost.
Schedule Performance	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.
Schedule Performance Details	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.
Staffing	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.
Staffing Details	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.
Staffing Outlook	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.
Status Report Indicators	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.
Status Report Listing	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.
Team Capacity	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.

Name	Type	Description
Team Member Organizer	Query	The query is modified to display the guidelines icon if the task has a valid URL as a guideline or a guideline is set up for the site.
Timesheet Notes	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.
Timesheet Review	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.
Transaction Review	Query	The query now includes the Cost Type as a column and filter. It also includes and the Entry Number as a parameter filter.
Upcoming Project Milestones	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 Items

The following steps explain how to 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 [PMO Release 3.1 to PMO Release 3.2 Upgrade](#) (see page 37) for a list of the items updated in the PMO Accelerator Release 3.2 and a description of the updates.

The [PMO v3.0 to Release 3.1 Upgrade](#) (see page 44) topic is also available and contains 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 or items that produced an error upon install or apply. When the PMO Accelerator is not upgraded right after upgrading from a previous Clarity release, several items will show as Not Installed and an alert message saying that the add-in needs to be installed will display. Install the add-in before reviewing the items showing as Upgrade Ready.
- 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 Items

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 3.2 and a description of the updates, see [PMO Release 3.1 to PMO Release 3.2 Upgrade](#) (see page 37).

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.

For more information, see the *Studio Developer's Guide*.

## 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 3.2.

# Chapter 3: Localization

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The user interface is available in the following supported languages:

- Brazilian Portuguese
- Chinese
- Czech
- Danish
- Dutch
- English
- Finnish
- French
- German
- Hungarian
- Italian
- Japanese
- 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 4: Documentation

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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 5: Additional Resources

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## 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



# Chapter 6: Upgrade Information

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## PMO Release 3.1 to PMO Release 3.2 Upgrade

If you have PMO Release 3.1 installed and you upgrade to PMO Release 3.2, 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 Release 3.1 was fully installed and applied, including all custom views, and it was upgraded to PMO Release 3.2. 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. If you do not apply a view update, you should read the description of the changes and consider manually making the changes in your configured views.

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

Name	Type	Description	Action
Current Issues Listing	Portlet	The Properties icon was replaced by the Dashboard icon and it links to the project dashboard. The Project column now links to the project properties page.	R
Overview	Page	The Overview tab shows as Upgrade Ready because of the changes made to the portlets in the General, Sponsor, Program Dashboard, PM Alerts, and Project Dashboard tabs. The Portfolio Dashboard tab was removed from the Overview Page along with the old Portfolio feature.	O
General	Tab	My Timesheets and My Reports portlets are now included in this tab. The deprecated Event (calendar.homeEvents) and Event Calendar (calendar.eventChanges) entries are removed.	O
Sponsor	Tab	The Sponsor tab shows as Upgrade Ready because of the changes made to the Project KPIs by OBS, Project Schedule, and Planned Cost by Project Type portlets.	O
Project KPIs by OBS	Portlet	The OBS/Project column now links to the project properties page. The Project Level column was renamed to Project Dashboard and the Dashboard icon mapped to this column. The Project Dashboard column links to the project overview when configured to display in the portlet. The Automatically Expand option is now unchecked.	R
Display Mappings – Icon (Dashboard)	Lookup	The Project Dashboard column is now mapped to the Dashboard icon in the Project KPIs By OBS query. This is the lookup for that display mapping.	SR

Name	Type	Description	Action
Project Schedule	Portlet	The Dashboard icon was included and it links to the project dashboard. The Project column was modified to link to the project properties page. The Project Type column now displays in the portlet as a column and filter. Planned Cost was removed from the filter.	R
Project Planned Cost	Portlet	The Project Planned Cost portlet was renamed to Planned Cost by Project Type and modified to display the percentage amount of planned cost for each project type.	R
Program Dashboard	Tab	The Program Dashboard tab shows as Upgrade Ready because of the changes made to the Program Manager Cost Dashboard and Program Manager Schedule Dashboard portlets.	O
Program Manager Schedule Dashboard	Portlet	The Properties icon was replaced by the Dashboard icon and it links to the project dashboard. The Project column now links to the project properties page.	R
PM Alerts	Tab	The PM Alerts tab shows as Upgrade Ready because of the changes made to the Milestones portlet.	O
Milestones	Portlet	The Properties icon was replaced by the Dashboard icon and it links to the project dashboard. The Project column now links to the project properties page.	R
Project Dashboard	Tab	The Project Dashboard tab shows as Upgrade Ready because of the changes made to the Project Manager Cost and Effort Dashboard portlet.	O
Project Manager Cost and Effort Dashboard	Portlet	The Actual Cost column was renamed to Actual Cost (ACWP).	R
Issues and Risks	Tab	The Issues and Risks tab shows as Upgrade Ready because of the changes made to the Risk Management and Issue Management portlets.	O
Risk Management	Portlet	The Properties icon was replaced by the Dashboard icon and it links to the project dashboard. The Project column now links to the project properties page.	R
Issue Management	Portlet	The Properties icon was replaced by the Dashboard icon and it links to the project dashboard. The Project column now links to the project properties page.	R
Project Costs by Resource	Portlet	The Actual Cost column was renamed to Actual Cost (ACWP).	R
Project Costs by Task	Portlet	The Actual Cost column was renamed to Actual Cost (ACWP).	R

<b>Name</b>	<b>Type</b>	<b>Description</b>	<b>Action</b>
Project Costs by Phase	Portlet	The Actual Cost column was renamed to Actual Cost (ACWP).	R
Schedule Performance Details	Portlet	The Properties icon was replaced by the Dashboard icon and it links to the project dashboard. The Project column now links to the project properties page.	R
Staffing Details	Portlet	The Properties icon was replaced by the Dashboard icon and it links to the project dashboard. The Project column now links to the project properties page.	R
Project Lifecycle Review	Portlet	The Properties icon was replaced by the Dashboard icon and it links to the project dashboard. The Project column now links to the project properties page.	R
Application Change Template Methodology	Project	This creates a project template that is referenced as the methodology of the Application Change Template item when it is applied. The methodology corresponding to the template should be applied when the template is applied.	R
Application Change Template	Project	Assignment ETC amounts were modified in cases where they were previously set to zero. The WBS was reviewed and the new Cost Type attribute set to Operating for each phase and task in this template.	R
Application COTS Template Methodology	Project	This creates a project template that is referenced as the methodology of the Application COTS Template item when it is applied. The methodology corresponding to the template should be applied when the template is applied.	R
Application COTS Template	Project	Assignment ETC amounts were modified in cases where they were previously set to zero. The WBS was reviewed and the new Cost Type attribute set to Operating for each phase and task in this template.	R
Infrastructure Deployment Template Methodology	Project	This creates a project template that is referenced as the methodology of the Infrastructure Deployment Template item when it is applied. The methodology corresponding to the template should be applied when the template is applied.	R
Infrastructure Deployment Template	Project	Assignment ETC amounts were modified in cases where they were previously set to zero. The WBS was reviewed and the new Cost Type attribute set to Operating for each phase and task in this template.	R
Major Project Template Methodology	Project	This creates a project template that is referenced as the methodology of Major Project Template item when it is applied. The methodology corresponding to the template should be applied when the template is applied.	R

Name	Type	Description	Action
Major Project Template	Project	Assignment ETC amounts were modified in cases where they were previously set to zero. The WBS was reviewed and the new Cost Type attribute set for the phases and their tasks. The Cost Type was set to Operating for the Initiation, Planning, Design, and Closing Phases. The Cost Type was set to Capital for the Construction and Deployment and Quality Phases.	R
Application Object List View	Custom View	The Properties icon was removed from this view. The Application column links to the application properties page.	O
Application Object Properties Views	Custom View	The Application Summary, Financial Summary and Settings subpages are modified. The Application Summary subpage includes the Work Status lookup field. The Financial Summary subpage includes the eight new cost fields: Planned Capital Cost, Planned Capital Cost %, Planned Operating Cost, Planned Operating Cost %, Budgeted Capital Cost, Budgeted Capital Cost %, Budgeted Operating Cost, and Budgeted Operating Cost %. The Planned Cost and Budgeted Cost fields are read-only. The Settings page includes the Billing Currency and Cost Type fields.	O
Asset Object List View	Custom View	The Properties icon was removed from this view. The Asset column links to the asset properties page.	O
Asset Object Properties Views	Custom View	The Asset Summary, Financial Summary and Settings subpages are modified. The Asset Summary subpage includes the Work Status lookup field. The Financial Summary subpage includes the eight new cost fields: Planned Capital Cost, Planned Capital Cost %, Planned Operating Cost, Planned Operating Cost %, Budgeted Capital Cost, Budgeted Capital Cost %, Budgeted Operating Cost, and Budgeted Operating Cost %. The Planned Cost and Budgeted Cost fields are read-only. The Settings page includes the Billing Currency and Cost Type fields.	O
Cost Plan Object Properties View	Custom View	The Last Updated By column label had extra spaces in the name in prior releases. It is now fixed and displays Last Updated By.	O
Cost Plan Detail Object List View	Custom View	The list view now displays the Cost Type column when the grouping attributes of the cost plan include cost type as a grouping option.	O
Cost Plan Detail Object Filter View	Custom View	The filter view now includes the Cost Type field.	O
Cost Plan Detail Object - Budget Filter View	Custom View	The filter view now includes the Cost Type field.	O
Cost Plan Detail Object Properties Views	Custom View	The property view now displays the Cost Type field when the grouping attributes of the cost plan include cost type as a grouping option.	O

<b>Name</b>	<b>Type</b>	<b>Description</b>	<b>Action</b>
Idea Object List View	Custom View	The Properties icon was removed from this view. The Idea column links to the idea properties page.	O
Idea Object Properties Views	Custom View	The Idea Summary and Financial Summary subpages are modified. The Idea Summary subpage includes the Work Status lookup field. The Financial Summary subpage includes the eight new cost fields: Planned Capital Cost, Planned Capital Cost %, Planned Operating Cost, Planned Operating Cost %, Budgeted Capital Cost, Budgeted Capital Cost %, Budgeted Operating Cost, and Budgeted Operating Cost %. The Planned Cost and Budgeted Cost fields are read-only.	O
Other Work Object List View	Custom View	The Properties icon was removed from this view. The Other Work column links to the other work properties page.	O
Other Work Object Properties Views	Custom View	The Financial Summary and Settings subpages are modified. The Financial Summary subpage includes the eight new cost fields: Planned Capital Cost, Planned Capital Cost %, Planned Operating Cost, Planned Operating Cost %, Budgeted Capital Cost, Budgeted Capital Cost %, Budgeted Operating Cost, and Budgeted Operating Cost %. The Planned Cost and Budgeted Cost fields are read-only. The Settings page includes the Billing Currency and Cost Type fields.	O
Product Object List View	Custom View	The Properties icon was removed from this view. The Product column links to the product properties page.	O
Product Object Properties Views	Custom View	The Product Summary, Financial Summary and Settings subpages are modified. The Product Summary subpage includes the Work Status lookup field. The Financial Summary subpage includes the eight new cost fields: Planned Capital Cost, Planned Capital Cost %, Planned Operating Cost, Planned Operating Cost %, Budgeted Capital Cost, Budgeted Capital Cost %, Budgeted Operating Cost, and Budgeted Operating Cost %. The Planned Cost and Budgeted Cost fields are read-only. The Settings page includes the Billing Currency and Cost Type fields.	O
Project Object List View	Custom View	The Properties icon was replaced by the Dashboard icon and it links to the project dashboard. The Project column now links to the project properties page. The column order is Dashboard link, Project, Status Report link, Gantt link, Documents link, Manager, Stage, Start, Finish, and Gantt Schedule.	O

Name	Type	Description	Action
Project Object Properties Views	Custom View	The Financial Summary and Settings subpages are modified. The Financial Summary subpage includes the eight new cost fields: Planned Capital Cost, Planned Capital Cost %, Planned Operating Cost, Planned Operating Cost %, Budgeted Capital Cost, Budgeted Capital Cost %, Budgeted Operating Cost, and Budgeted Operating Cost %. The Planned Cost and Budgeted Cost fields are read-only. The Settings page includes the Prevent Unassigned Timesheet Tasks and Cost Type fields.	O
Program List View	Custom View	The Properties icon was replaced by the Dashboard icon and it links to the project dashboard. The Program column now links to the program properties page. The column order is Dashboard link, Program, Subprojects link, Status Report link, Gantt link, Documents link, Manager, Stage, Start, Finish, and Gantt Schedule.	O
My Projects List View	Custom View	The Properties icon was replaced by the Dashboard icon and it links to the project dashboard. The Project column now links to the project properties page. The column order is Dashboard link, Project, Stage, Status link, Team link, Gantt link, and Documents link.	O
Service Object List View	Custom View	The Properties icon was removed from this view. The Service column links to the service properties page.	O
Service Object Properties Views	Custom View	The Service Summary, Financial Summary and Settings subpages are modified. The Service Summary subpage includes the Work Status lookup field. The Financial Summary subpage includes the eight new cost fields: Planned Capital Cost, Planned Capital Cost %, Planned Operating Cost, Planned Operating Cost %, Budgeted Capital Cost, Budgeted Capital Cost %, Budgeted Operating Cost, and Budgeted Operating Cost %. The Planned Cost and Budgeted Cost fields are read-only. The Settings page includes the Billing Currency and Cost Type fields.	O
Status Report Subobject Properties View	Custom View	The create view was displaying the Project Manager field as required and it was not accepting any value. As a result a new status report could not be created. It is fixed to not display the Project Manager.	O
Task Object Properties Views	Custom View	The Settings subpage is modified. The Settings page includes the Cost Type field.	O

## 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. If you do not apply a view update, you should read the description of the changes and consider manually making the changes in your configured views.

**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. PRJPENDINGES TIMATES.RECO MMEND_CHAN 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 Views	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.	O
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.	O
Project Object Properties Views	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.	O
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.	O
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.	O
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.	O