CA Clarity™ PPM

Change Impact and Upgrade Guide - On Demand

Release 13.2.00

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Chapter 1: About this Guide

This guide provides the following information:

- System preparation before upgrading
- Post-upgrade tasks
- Features and enhancements for this release and upgrade actions that are required for them

Important! If you are upgrading from a release earlier than Version 13.1, carefully review the *Change Impact and Upgrade Guide* for the 13.0 and 13.1 releases. If you are upgrading from Version 13.1 to this release, review this guide before upgrading. This guide provides insight on planning the upgrade and helps you determine the upgrade options that best suit your business needs. Use this guide to plan your training and rollout efforts.

Look for recent updates to this guide before upgrading. The most recent edition of this guide and all CA Clarity PPM documentation are available from the CA Clarity PPM (On Demand) bookshelf. The bookshelf is available on the Documentation page of CA Support Online.

Chapter 2: Upgrade

This section contains the following topics:

Upgrading to 13.2 (see page 9)
Post Upgrade Steps (see page 15)
Upgrade Tips (see page 17)

Upgrading to 13.2

This section provides information about upgrade changes for Release 13.2.

Java 7

This release uses Java 7. The following software clients require Java 7:

- XML Open Gateway (XOG) client
- Open Workbench
- Connector for Microsoft SharePoint
- Service Connect

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

Upgrade Actions: Install Java 7 on workstations that have the software clients listed installed.

Datamart Extraction Job Performance Improvements

For Release 13.2, changes were made to the Datamart Extraction job. The result of the changes is improved performance for a full refresh of the Datamart. The job has been optimized to run faster. The job does a full refresh of the Datamart tables every time it runs. We recommend running the Datamart Extraction job after the upgrade is complete and during off-peak hours.

Upgrade Action: None

Add-ins Compatibilities

The following section describes important information about upgrading installed add-ins, accelerators, and connectors for Release 13.2.

- If you are upgrading from Version 13.0 or Release 13.1 to Release 13.2, the following add-ins are upgraded, if deployed:
  - PMO Accelerator
  - Clarity Solution Pack (CSP)
  - Accelerator for New Product Development (NPD)
  - Connector for Microsoft SharePoint
  - Business Relationship Manager (BRM)
  - CA Clarity Agile
- If you are upgrading from any version before Version 13.0 to Release 13.2, all installed add-ins are upgraded.

The following table shows the accelerator and connector releases that are installed with a Release 13.2.

Accelerator or Connector	Upgraded Version
PMO Accelerator	3.2.0
Clarity Solution Pack (CSP)	3.2.0
Earned Value Manager	2.0.1
Accelerator for PRINCE2	2.0.1
Accelerator for the PMBOK	2.0.1
Accelerator for New Product Development	2.0.2
BRM Accelerator	3.0.2
Connector for CA Unicenter Service Desk & CA Software Change Manager™ for Distributed	2.0.1
Connector for Microsoft SharePoint	2.0.2
Service Connect	2.0.0
Catalyst Connector	3.3.0
CA Clarity Agile	Spring 2013

Add-ins Affected by Portfolio Removal

The removal of old Portfolio features affected the following add-ins:

- BRM Accelerator
- New Product Development (NPD)
- PMO Accelerator

All three add-ins had portfolio-related portlets that were removed. For BRM Accelerator and NPD, the pages that displayed the portlets were left in place. The pages were left to accommodate customers who placed custom portlets or other valid portlets on the pages. If no custom or other portlets are present, the pages appear blank.

For the PMO Accelerator, the pages that contained portfolio-related portlets were removed. For the list of portlets and other features that were removed from CA Clarity PPM, see the section named "Removal of the Old Portfolio Feature (see page 37)."

Upgrade Action: If you use BRM Accelerator or NPD, review your Studio portlet pages and delete any that are empty.

Release 13.2 Reports

Starting with Release 13.2, all reporting content for CA Clarity PPM is delivered in the Clarity Solution Pack.

Upgrade Action For All Prior Clarity Versions: Legacy stock report definitions in Studio are inactivated during the upgrade process. The report definitions are converted from *system-restricted* status to *user-defined* to give you full control over the definitions. The existing reports in your Report Library become hidden because the report definitions have been deactivated. You can use the legacy stock reports and can see related instances in the Report Library by following these steps:

1. Open Administration, and from Studio, click Reports and Jobs.
2. Filter for Inactive Reports.
3. Activate the reports that you want to continue to use with Release 13.2.

Note: CA is no longer providing support for these reports. Activating a report is done with the understanding that you are responsible for all changes to maintain compatibility with Release 13.2 and releases beyond.

Post-Upgrade Action: The Clarity Solution Pack, which delivers the Release 13.2 compatible reporting content, is installed with your upgrade.

Xcelsius Designer 2008 SP6

Xcelsius Designer definition files created before Release 13.2 are overwritten during the upgrade. To continue to use your older design definition files, back up the files and regenerate new .swf files using Xcelsius 2008 SP6. Retest your interactive portlets after the upgrade to ensure they work with this release.

The Xcelsius Designer 2008 SP6 contains CRSF fixes for .swf files generated from the Xcelsius Designer client.

Post-Upgrade Action: If you created custom Xcelsius Dashboards, we recommend that you regenerate the .swf files for your dashboards using the Xcelsius Designer 2008 SP6 client.

Update Business Objects Reports Table Job

The *Update Business Objects Reports Table* job has been updated. The following list shows the parameters that were added, removed, or changed.

New parameter

Update Resource Skills Index. This parameter extracts resource skills and proficiencies.

Removed parameters

Update Portfolio Content. This parameter was removed as part of the old Portfolio feature removal.

Week Starting Day. This parameter was obsolete. All reports now use the *First Day of Work Week* parameter as defined in settings that are located by navigating to Administration, Project Management, Settings.

Changed parameters

Update Universe Calendar is now Update Reporting Calendar.

Update Program Hierarchy is now Update Investment Hierarchy. This parameter extracts investment hierarchies and the allocation percentages.

CA Clarity PPM Universes

The CA Clarity PPM Legacy universes are no longer provided with the service.

Upgrade Action: None

The CA Clarity PPM Universes have been updated to reflect database schema changes in Release 13.2. The Portfolio Class has been removed from the Investments Universe. The new Cost Type attribute and the Capital Cost and Operating Cost amounts have been added.

Note: See the *Business Objects Universe Developer Guide* for details.

Upgrade Action: As part of your Clarity 13.2 upgrade process, all universes are updated.

Access Right to View My Reports

To see the My Reports portlet, users must have the following access right:

Report - Access

Allows a user access to the reports pages. This access right is dependent upon one of the following access rights being granted to a user:

- The *Reports - Run - All* access right
- Instance level access rights such as *Report - Run*, *Report - View Output*, or *Report - Edit Properties*

Upgrade from a Release Earlier than Release 12.1

This topic explains the upgrade actions to take for reports if you have a CA Clarity PPM version earlier than Release 12.1.

Note: BusinessObjects report instances that are created in a version earlier than Release 12.1 can be viewed only as a PDF file after the upgrade.

Upgrade Actions:

Preupgrade:

- If you used any CA Clarity PPM universe objects, create a custom universe and link it to the CA Clarity PPM universe. The CA Clarity PPM universe is overwritten when the new Release 13.2 universes are installed.
- If you previously purchased the GSE Universes from CA Services, these universes are not overwritten by the Release 13.2 out-of-the-box universes.
- If you modified any out-of-the-box reports, either rename them, assign new IDs to them, or export the reports to a BIAR file..

Post-Upgrade:

- If you decide to continue using the old reports, see the instructions about reactivating legacy stock report definitions in the topic "Release 13.2 Reports (see page 11)."

  Manually reschedule the scheduled reports. The scheduled reports that were configured before the upgrade to Release 13.2 do not automatically run after the upgrade.
- Reset the BusinessObjects InfoView passwords for all preupgrade users who must log in to InfoView and run reports.

- Synchronize the user lists in BusinessObjects and CA Clarity PPM by running the *Create Business Objects Users* job. If the job is not run, a CA Clarity PPM user must have a BusinessObjects account created to run or open a report.

  The job creates a user in BusinessObjects for every user in CA Clarity PPM. The user that is created in BusinessObjects is given an encrypted password. To log in to the BusinessObjects server using the assigned password, the user ID and password must be reset under BusinessObjects Administration.

Upgrade from a 12.x Release or Service Pack

This topic explains the upgrade actions to take for reports if you have a CA Clarity PPM version older than Release 12.1.

There are no new user or security configurations; Release 13.2 uses the same CABI requirements and trusted authentication integration with CA Clarity PPM as Release 12.1 and Service Pack 12.1.1.

Upgrade Actions:

Preupgrade:

- If you used any CA Clarity PPM universe objects, create a custom universe and link it to the CA Clarity PPM universe. The CA Clarity PPM universe is overwritten when the new Release 13.2 universes are installed.
- If you previously purchased the GSE Universes from CA Services, these universes are not overwritten by the Release 13.2 out-of-the-box universes
- If you modified any out-of-the-box reports, export them to a BIAR file.

Post-Upgrade:

- If you decide to continue using the old reports, see the instructions about reactivating legacy stock report definitions in the topic "Release 13.2 Reports (see page 11)."

  Manually reschedule the scheduled reports. Scheduled reports that were configured before the upgrade to Release 13.2 do not automatically run after the upgrade.
- Synchronize the user lists in BusinessObjects and CA Clarity PPM by running the *Create Business Objects Users* job. If the job is not run, a CA Clarity PPM user must have a BusinessObjects account created to run or open a report.

  The job creates a user in BusinessObjects for every user in CA Clarity PPM. The user created in BusinessObjects is given an encrypted password. To log in to the BusinessObjects server using the assigned password, the user ID and password must be reset under BusinessObjects Administration.

Post Upgrade Steps

Complete the following post upgrade steps:

1. If you have custom Xcelsius dashboards, see "Correcting the CA Clarity PPM URL for HTML and Xcelsius Portlets" in the Version 13.0 *Change Impact and Upgrade Guide*.
2. For CABI Release 3.3 (BusinessObjects), manually restart the scheduled reports.

   Note: Any scheduled reports that were configured before the upgrade to this release do not automatically run after the upgrade.
3. Apply your upgraded add-ins and connectors.

   Notes:

   - Request a backup of your CA Clarity PPM installation before installing each add-in so that you can restore the application if necessary. You can also use the previous night's regular backup as a restore point.
   - Apply the Upgrade Ready content for those items that you are actively using.

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

     Best Practice: If you modified stock CA Clarity PPM content, copy the modified content before upgrading. Then, apply the new incoming stock CA Clarity PPM content, and retrofit the modifications to the new content.
   - Read the PMO Accelerator Release Notes for important information about what has changed for PMO Accelerator.
   - Review the *System: Clarity Content* add-in for upgrade ready content (for example, the Role Capacity portlet). To accept the new Release 13.2 upgraded content, apply the changes.
4. Review the Studio views and system content and manually upgrade as needed.

   The upgrade preserves all preexisting Studio view configurations. If an existing view has configurations or if the object for the view is partitioned, the system does not automatically upgrade the view and/or the partition.

   To determine which views were not automatically upgraded, use the Studio Views list page.

   Some tips on reviewing the views:

   - The Last Version column identifies changes to stock views in Release 13.2.
   - If a view was automatically upgraded as part of the upgrade process, a checkmark appears in the Upgraded column. No further action is required.
   - If a view that changed in Release 13.2 was not upgraded due to pre-existing configurations, decide whether to apply the changed view.

     Look for views with the following column information:

     Last Version column=13.2 and the Upgraded column= unchecked.

5. Verify your NSQL queries.

   During the upgrade, the NSQL validator script automatically verifies NSQL queries. Results are written to the admin.log. This log contains the following information:

   - Query name
   - Query ID
   - Content Source
   - Query ID from CMN_NSQL_QUERIES of the query that failed validation

   This release contains database schema changes. To ensure that portlets work, correct any invalid NSQL queries.

   Note: For information about the database schema changes, see the chapter "Data Model Changes."

   Upgrade Action:

   If the query can be changed in Studio, complete these steps:

   a. Go to the NSQL tab for each failing query.
   b. Click the Preview button.
   c. Review the errors.
   d. Repair the broken query constructs or fields.
   e. Click the Preview button.
   f. Confirm that the NSQL query is valid.

   If the query is in use by active portlets and cannot be edited in Studio, complete these steps:

   g. User the XML Open Gateway (XOG) to export the failing query.
   h. Correct the broken query constructs or fields.
   i. Use XOG to import the corrected query.
   j. Click the Preview button.
   k. Confirm that the NSQL query is valid.

Upgrade Tips

Read the following preupgrade and postupgrade tips to ensure that your upgrade to this release works as planned.

Preupgrade

- You must have the standard base calendar available in your CA Clarity PPM application before you upgrade. If you deleted the shipped calendar named *Standard*, create it before upgrading. Contact CA Support if your CA Clarity PPM instance is missing the Standard base calendar.
- Process all "In progress" transactions into WIP.

  Verify the following conditions:

  - imp_transactionimport and ppa_transcontrol are clear.
  - WIP adjustments are approved.

  Review and fix all invalid transactions.
- Review Time Slices.

  Verify that the table is slicing out only the data that is required. If extra data is getting sliced, the effort adds to database size and the effort affects performance.
- Complete and put all processes on hold.
- Remove or delete process history, notifications, jobs, or logs. Look for items that you do not need to retain.
- Pause all scheduled jobs. Take special note of the *Time Slicing* job. Pause it before stopping the CA Clarity PPM services prior to upgrade.

Post Upgrade

- The Java Runtime Environment (JRE) is no longer available from the Clarity Software Downloads link. Review the supporting documentation and training materials you provide to your users. Wherever these materials direct users to download the JRE from within CA Clarity PPM, update the reference. Direct your users to download the JRE (Version 7) from www.java.com.
- Register any Portfolio Investment attributes that you want to display in portfolio pages. Although the required attributes display by default, you are required to register any other attributes (stock or custom) that you want to display.

Chapter 3: Administration

Configurable Organizational Breakdown Structure (OBS)

The Configurable OBS feature lets a CA Clarity PPM administrator configure an OBS like other CA Clarity PPM attributes. Here are some examples of how the CA Clarity PPM administrator can configure the OBS attributes:

- Make the OBS field mandatory.
- Make the OBS field read-only.
- Set the OBS field so that the value is entered only once.
- Set the default value for the OBS field.
- Set the override default value for the OBS field.
- Hide the OBS field.
- Change the label for the OBS field.
- Move the OBS section to another subpage or a secured subpage.
- Rename the OBS section.
- Delete the OBS section.
- Move the OBS fields out of the OBS section to any other section.
- Configure the OBS attributes on the list page.
- Use inline editing.
- Enable audit trail for the OBS attributes.
- Use auto-suggest for the OBS fields.
- Use language translation for the OBS fields.
- Use an OBS field in the system or manual action of a process definition.

When an object is associated with an OBS, the following actions happen:

- The associated object appears as a hyperlink under the Associated Objects section on the OBS Properties page.
- For a non-financial OBS, an attribute with the OBS name and *OBS - Lookup* Data Type is created on the associated Object Attribute page.

- For a financial OBS, an attribute named *Department OBS* of *OBS Entity - Lookup* Data Type is created on the associated Object Attribute page. The *Department OBS* attribute is created only on the first association of an object with the financial Department OBS. As a result, you have only one Department OBS attribute in the attributes list of the associated object.

- These Data Types are reserved only for the OBS attributes and are not available for the custom attribute creation. However no attribute is created when you associate an object with the Location OBS.

The following tables provide you the details of the OBS attributes that are created after the association.

Financial OBS				
OBS Name	**Object Name**	**Attribute Name**	**Attribute ID**	**Data Type**
CA Dept	Project[1)]	Department OBS	odf_obs_fin_dept	OBS Entity - Lookup
CA Loc	Project	N/A	N/A	N/A
Non-financial OBS				
OBS Name	**Object Name**	**Attribute Name**	**Attribute ID**	**Data Type**
Resource Pool	Project	Resource Pool[2)]	odf_<first four valid characters of the OBS_ID>_<#code of the OBS ID>	OBS - Lookup

Notes:

- [1)]Can be any except the following objects:
  - Financial OBS: Company, Incident Category, Job/Report, Page, Portfolio, Portlet, Process Definition, Release, Release Plan, and Requirement.
  - Non-financial OBS: Incident Category, Job/Report, Page, Portlet, and Process Definition.
- [2)]By default, the OBS name, and the attribute name are the same when an object is associated with a non-financial OBS.

For more information about the configurable OBS, see the *Administration Guide*.

Chapter 4: Add-in Enhancements

Auto-recalculation Feature in Microsoft Project (MSP) Connector

In Microsoft Project (MSP), the whole project is recalculated after being opened in CA Clarity PPM only if the Calculation Mode for a schedule is set to On.

In previous releases, when you exported a project from CA Clarity PPM to MSP, the End Date and Dependency fields change. These fields are recalculated and updated for some tasks. The update occurs even though the Calculation Mode is set to Manual in MSP.

Starting with this release, you can export a project from CA Clarity PPM to MSP without updating the End Date and Dependency date fields. To prevent these fields from updating, complete the following tasks:

- Set the Calculation Mode for the schedule to Off in MSP.
- Set the Loading Pattern for all tasks in a project to Uniform in CA Clarity PPM.

You can update the end date of a task that is assigned to a resource with a termination date earlier than the task end date. The following table illustrates how task end dates are updated in these cases.

Resource Termination Date	Update to the Task Finish Date
Before the task start date	The task finish date is set to the task start date. The task is changed to a milestone task.
After the task start date but before the task finish date	The task finish date is set as the resource termination date.

In both the cases, the task end date is set according to the resource termination date.

PMO Accelerator and Clarity Solution Pack

For enhancement information on these CA Clarity PPM products, see the *PMO Accelerator Release Notes* and the *Clarity Solution Pack Release Notes*.

Chapter 5: Financial Management

This section contains the following topics:

Capital and Operating Expenses (see page 23)
Update Investments Created Before Release 13.2 to Display Capital and Operating Expenses (see page 25)

Capital and Operating Expenses

You can show operating and capital costs separately on the simple budget page and in a detailed financial plan. You can enter the cost information in the following ways:

- For a high-level estimate, enter the sums for these expenses directly on the investment budget page.
- For a more detailed view of cost type information, set up an investment financial plan that collects operating and capital expenses. You can collect detailed cost information from tasks or team allocation.

The following table shows the changes for this new feature.

New Attributes Added	Page or Area	Object	Default Value	User Interface Behavior	XML Open Gateway	Security
Cost Type	Investment financial properties	projfinproperties npiofinancial properties	Operating	The attribute is required on the investment financial properties page. In Release 13.2 the attribute is visible on the financial properties view even if the view is customized.	The attribute is not required in the XOG. It is added as part of the investment general properties.	

New Attributes Added	Page or Area	Object	Default Value	User Interface Behavior	XML Open Gateway	Security
Cost Type	Task	task	None	In Release 13.2, the attribute is not visible by default. It must be configured to display.	The attribute is added as part of task in the Investment XOG.	This attribute is editable only if financial access rights are granted. Although you can edit this attribute in Open Workbench and Microsoft Project, you must have financial access rights to save the edits to CA Clarity PPM.
Capitalization Percent	Team	team	None	The attribute is not visible by default. It must be configured to display.	The attribute is added as part of team in the Investment XOG.	This attribute is editable only if financial access rights are granted.

New Attributes Added	Page or Area	Object	Default Value	User Interface Behavior	XML Open Gateway	Security
Planned Capital Cost Planned Operating Cost Budget Capital Cost Budget Operating Cost Planned Capital % Planned Operating % Budget Capital % Budget Operating %	Simple budget	financials	N/A	The attributes are not visible by default. They must be configured to display.	The following fields are not part of the XOG: Planned Capital % Planned Operating % Budget Capital % Budget Operating % The remaining fields will be added with investment general properties. The following existing fields become read only: Planned Cost Total Budget Cost Total	

Update Investments Created Before Release 13.2 to Display Capital and Operating Expenses

After you upgrade to this release, you can update investments that were created before Release 13.2 to show capital and operating expenses. Updating your investments is optional and depends on your business needs. Update only if you want to display capital and operating expenses separately in financial plans.

The following jobs automate the task of adding the Capital and Operating cost type to investments:

Enable Capitalization

This job sets the Cost Type attribute to Operating or Capital on the investments, tasks, and transactions that you select for the update. You select and map investment charge codes to either Operating cost type or Capital cost type. When the job runs, the cost type that is mapped to the charge code is applied to the investment and its tasks and transactions. This job also updates the capitalization percent on the investment team records if you enter a Capitalization Percent value in the job parameters.

Copy Cost Type Plan of Record Charge Code with Cost Type

This job creates a copy of an investment plan of record and adds Cost Type to the list of existing grouping attributes. To make an investment eligible for this job, you are required to run the *Enable Capitalization* job successfully on the investment first.

If you do not run the jobs, you see the following results:

- All existing investments have a cost type of Operating.
- All records in the PPA_WIP table have a cost type of Operating.

Upgrade Action: (Optional) Run the jobs in the order that is listed to update investments that were created before Release 13.2.

If you are processing investments with large amounts of data, limit the number of investments for a job run. When all of your investments have been successfully processed to show capital and operating expenses, we recommend deactivating the jobs.

Note: For more information about the jobs, see the *Administration Guide*.

Chapter 6: Mobile Time Manager

The CA Clarity Mobile Time Manager lets you submit timesheets and approve timesheets from a mobile smartphone. The Mobile Time Manager feature lets you:

- Submit a timesheet
  - Populate timesheet items from the previous timesheet period.
  - Return a timesheet that was previously submitted.
- Approve a timesheet
  - Complete bulk timesheet approvals or returns.
  - Send a reminder to resources who have not submitted their timesheets.
  - Complete ad-hoc and action item timesheet approvals.

Upgrade Action: None.

Note:

- To allow the workflow timesheet action item approvals from the Mobile Time Manager, update the workflow process definition to configure *Approve* and *Return* in the manual action item step.
- A user requires the global access right *Mobile - Access* to view data from a CA Clarity PPM instance using the Mobile Time Manager.

Chapter 7: Open Workbench

For any new features and enhancements in OWB, refer to the *OWB Release Notes*.

This section contains the following topics:

Date Attribute (see page 29)
User Interface Improvements (see page 30)
Dependency Deletion (see page 30)
Draggable Margins in the Print Preview (see page 31)
Cost Type Attribute (see page 31)

Date Attribute

Starting with this release, you can use the Date and Time option in the Formatting Options to configure the Date attribute. This option is applicable only for the Date attribute and is cleared by default. When you configure the Date attribute, the configuration can be persisted into the View data just as other options.

The Date and Time option is supported in the following languages:

- French
- German
- Japanese
- Portuguese

Note: The Open Workbench Date format configuration is independent of, and does not affect, the CA Clarity PPM view configuration. The configuration persists only on the client side and cannot be saved back to CA Clarity PPM. If you configure the Date attribute to appear as Date and Time in CA Clarity PPM, the configuration exists only in the application and it does not affect Open Workbench. By default, the Date attribute appears as Date in Open Workbench, unless you have configured that attribute to appear as Date and Time.

Upgrade Action: None

User Interface Improvements

This release includes the following user interface enhancements to make it grid-based:

- **Auto-resizing of columns**

  Double-clicking the column separator in the head of a grid view resizes the column width. The column to the left of the separator automatically resizes so you can see the full content. If the content is wider than the available space, the columns resize so that the fields fill the available space, but leave room for other columns.

- **Auto-resizing of panels**

  Double-clicking the panel separator moves the separator to fit the panel to the left of the separator so that the full panel is visible. If the panel is wider than the screen, the separator moves, pushing the panels to the right off the screen.

- **Correct scaling of scroll bars to content**

  Before this release, the scroll bars did not tell you how much content is in the view and in which position the display is located in the view. Starting with this release, the size of the scroll bars reflects the portion of the screen that is visible in relation to the total content. If the content of the panel is two screens high, the vertical scroll bar handle occupies half of the available scroll bar height. This allows you to see how much content is in the panel and you can also determine the exact position of the display.

- **Removal of scroll bars when not necessary**

  Before this release, the grid scroll bars were available even if there was no scrollable content. Starting with this release, the scroll bars disappear when no scrollable content is present, allowing for a larger display of data.

Upgrade Action: None

Dependency Deletion

The Dependency Deletion feature lets you remove unwanted dependencies. The feature is divided into the following parts:

- **Dependency Selection**

  When you hover over a dependency line in the Gantt chart, the cursor changes to crosshair.

- **Edit or Delete the Dependency**

  Double-clicking the dependency line opens the Task Properties window with the Dependencies tab selected and the successor task highlighted. You can edit or delete the highlighted task.

Upgrade Action: None

Draggable Margins in the Print Preview

You can turn on and off the appearance of separation lines using the Show margins check box in the ribbon menu. The separation lines appear between two display elements, for example, between the page header and the page content. Use these separators to change the delimiters and page area for each element.

Upgrade Action: None

Cost Type Attribute

Starting with this release, the Cost Type attribute is added as part of a task and a project in the investment XOG. You can edit the Cost Type attribute and save it back to CA Clarity PPM only if you have the following access rights:

Global Rights	Instance Rights
Project - Edit Financial - All	*Project - Edit*
Project - Enable Financial	*Project - Edit Financial*

Without these access rights, you can only edit the attribute, but you cannot save it back to CA Clarity PPM.

Note:

- You can edit and save the Cost Type attribute for all projects and tasks when you have at least one of these Global rights.
- You can edit and save the Cost Type attribute for specified projects and tasks when you have at least one of these Instance rights.
- For master or subproject structure, instance rights cannot be inherited from the master project to a subproject.

Upgrade Action: None

Chapter 8: Portfolio Management

This section contains the following topics:

New Portfolio Feature (see page 33)
Portfolio Pages (see page 34)
Portfolio Access Rights (see page 35)
Attribute Registry for the Portfolio Investment Object (see page 36)
Removal of the Old Portfolio Feature (see page 37)
Backup of Removed Portfolio Tables (see page 44)

New Portfolio Feature

The Portfolio functionality was rewritten for Release 13.2. Some of the highlights include the following features:

- The ability to plan portfolios by cost types (capital or operating).
- The ability to plan constraints (cost or resource) by specific period.
- The ability to create portfolio investment ranking rules.
- The ability to rank investments manually.
- Drag and drop capabilities for investment start and end dates and investment rankings.
- The addition of a *sync* job to synchronize the investment information with portfolios manually, or at specified time intervals. This ability lets portlet-based portfolios gather the portfolio information more efficiently from one central area.
- A portfolio dataprovider created with a consistent naming convention.
- A job that is aligned to each portfolio can be configured to update the portfolio investment information at user-defined intervals, or on a manual basis.

The old portfolio feature was removed from the user interface. The new portfolio feature has new data providers and new database tables and columns. Queries, both stock and custom, that worked with previous releases do not work with Release 13.2.

Some old portfolio information is preserved in backup tables during the upgrade. For more information, see the section that is named "Backup of Removed Portfolio Tables (see page 44)."

Upgrade Action: (Optional) Use the new Portfolio feature to create new portfolios using the user interface.

Portfolio Pages

The following descriptions outline the features that are found on each Portfolio page.

Portfolio Properties Page

- Inclusion of the cost type (operating or capital) for use for portfolio planning purposes.
- Ability to select a portfolio manager (one or many) from a list of resources.
- Ability to select a portfolio stakeholder (one or many) from a list of resources.
- Ability to set portfolio synchronization time periods.
- Display of the portfolios last sync date and time.
- Ability to set portfolio effort measurement units (for resources or roles) to either hours or full-time equivalents (FTE’s).

Portfolio Contents Editor Page

- Ability to include specific investments by rules or investment criteria.
- Ability to add specific investments to the portfolio manually.
- Ability to add the relationship between parent and child portfolios.

Investment Page

- Ability to view and change selected plan information relating to investments.
- Ability to change, by period, the selected plan investment cost information.

Targets Page

- Ability to distribute targeted costs (operating and expense) by period to be used as a constraint for portfolio planning purposes.
- Ability to distribute targeted benefits by period to be used as a constraint for portfolio planning purposes.
- Ability to distribute targeted role effort by period to be used as a constraint for portfolio planning purposes.
- Ability to filter and repopulate the role capacity information by different parameters.
- Ability to scale the role information higher or lower.

Plan Page

- Ability to distribute targeted costs (operating and expense) by period to be used as a constraint for portfolio planning purposes.
- Ability to distribute targeted benefits by period to be used as a constraint for portfolio planning purposes.

Waterline Page

- Ability to rank investments by constraint and other information characteristics.
- Ability to change and run ranking rules against investments.
- Ability to modify an investment ranking manually using drag-and-drop functionality.
- Ability to change *what-if* and investments start and end date by dragging and dropping on an investment timeline.
- A *waterline* to allow the analysis of investment information against portfolio plan constraints.
- Ability to drag-and-drop the waterline manually.
- An indicator (gauge) of portfolio constraints in the relationship to investment information that is above and below the waterline.
- Ability to change the timescale of information for the investment.

Portfolio Access Rights

Users require the new Portfolio access rights after the upgrade. Without the assignment of the new Portfolio access rights, users cannot see the Portfolio menu links after logging in to the application. The system administrator must manually assign users rights. No automatic assignment of new rights for users who had the old Portfolio rights is available.

Upgrade Action: Assign access rights for the new Portfolio feature to the users who require them.

The following access rights are required to work with portfolios:

Portfolio - Create

Allows a user to create Portfolios.

Includes: *Portfolio - Navigate* right to navigate to the portfolio pages.

Type: Instance

Portfolio - Navigate

Lets a user access the portfolio pages.

Type: Instance

Portfolio - Edit All

Lets a user edit all Portfolios.

Type: Global

Portfolio - Edit Access Rights - All

Lets a user edit the access rights for all portfolios. This access right does not include the *Portfolio - Navigate* or *Portfolio - View* rights.

Type: Global

Portfolio - View Access Rights - All

Lets a user view the access rights for all portfolios. This access right does not include the *Portfolio - Navigate* or *Portfolio - View* rights.

Type: Global

Portfolio - View All

Lets a user view all portfolios.

Type: Global

Portfolio - XOG Access

Lets a user import and export portfolio instances using the XML Open Gateway interface.

Type: Instance

You can select a user as a Manager or a Stakeholder on a portfolio's properties page. Being selected as a Manager or Stakeholder automatically a user the following rights to the portfolio:

- Manager. This user can edit information in the portfolio.
- Stakeholder. This user can only view information in the portfolio.

No access rights apply to the investments and plans that are contained in a portfolio. If you have rights to view or edit a portfolio, you can view or edit all investments and plans in the portfolio.

Attribute Registry for the Portfolio Investment Object

The required Portfolio Investment object attributes are displayed by default in your new portfolio pages and views. However, you must register any other Portfolio Investment attributes (stock or custom) that you want to display. You can locate the attribute registry by opening the Portfolio Investment object in Studio and clicking Attribute Registry.

Note: If you make changes in the attribute registry, remember to sync your changes by running the *Synchronize portfolio investments* job. The job refreshes the investments in the portfolio pages with information from actual investments.

For information about using the attribute registry, see the *Studio Developer's Guide*.

Removal of the Old Portfolio Feature

The old Portfolio feature has been removed from the product and a new Portfolio Management feature has been added. If your home page was an old Portfolio page or tab, your home page is no longer in the product. In this case, your home page in Release 13.2 reverts to the system default home page.

Upgrade Action: If your home page was an old Portfolio page or tab, log in to CA Clarity PPM and select a new home page.

Portlets from the old Portfolio feature have been deleted, but the pages that contained the portlets remain. The pages were left in place to accommodate customers who customized the pages by adding other valid portlets. Pages with no custom portlets are still visible, but they are empty.

Upgrade Action: Review your Studio portlet pages and delete any that are empty.

During the upgrade, customer-defined objects that include references to the old Portfolio feature are deleted. An audit of deleted objects is written to the upgrade-ca.log file.

Upgrade Action: Review the upgrade-ca.log file for a list of items that are deleted during the upgrade. The deleted items that are logged include:

- Customer-defined and stock objects
- Subobjects
- Pages
- Tabs
- Menu items
- Portlets
- NSQL scripts
- Favorites
- Security rights and groups
- Lookups
- Attributes that are based on deleted lookups
- Database tables, views, triggers, procedures, packages, and functions
- Processes

The following information for the old Portfolio feature was removed from Release 13.2:

- The Portfolio object and any user-defined custom subobjects

- Groups:
  - PortfolioUsers
  - PortfolioManager
  - PortfolioAccess
- Access rights (Instance, OBS, and Global):
  - *Portfolio - Create*
  - *Portfolio - Edit*
  - *Portfolio - Edit Access Rights*
  - *Portfolio - Edit Access Rights - All*
  - *Portfolio - Edit - All*
  - *Portfolio - Manager (Auto)*
  - *Portfolio - Navigate -*
  - *Portfolio - Create Scenarios*
  - *Portfolio - View Scenarios*
  - *Portfolio - View*
  - *Portfolio -View - All*
  - *Portfolio - XOG Access*
- Menu items:
  - The old Portfolios menu option from the Portfolio Management section of the Home menu. This menu item was replaced for the new Portfolios feature.
  - Custom menu items that reference the old Portfolio feature
  - Favorites that reference the old Portfolio feature
- Stock Portlet Pages and Tabs:
  - Portfolio Default Layout
  - PMO Portfolio Layout
  - Products Dashboard (NPD)
  - Projects Dashboard (NPD)
  - Idea Dashboard (NPD)
- Lookups: Portfolio out-of-the box and custom dynamic lookups (static lookups remain)

- NSQL Queries. Any custom NSQL queries that reference affected database tables or database views were removed.

  The following out-of-the-box NSQL queries were removed:

  - Benefits by Goal
  - Planned Costs Monthly
  - Life-cycle Funnel
  - Budget and Forecast by Goal - v13
  - Portfolio Financials Aggregation - v13
  - Portfolio Investment Goals - v13
  - Portfolio Investment Listing - v13
  - Portfolio Investments Scorecard - v13
  - Portfolio Benefits and Costs
  - Portfolio Benefits By Goal
  - Portfolio Listing
  - Resource Capacity and Demand
  - Role Capacity and Demand
  - Capital vs Expense By Period
  - Capital vs Expense Budget and Forecast
  - Key Performance Indicators
  - Cost and Effort Performance
  - Brand Portfolios
  - Portfolio Revenue and Cost
  - Role Capacity and Demand[Plan of Record]
  - Role Capacity and Demand [Scenario]
  - Stage Gate Review
  - Portfolio Listing
  - Portfolio Revenue and Cost per Year

- Portlets. Custom portlets that use information from the Portfolio object were removed. Portlets that use information from out-of-the-box data providers or NSQL queries that reference affected database tables or database views were removed.

  - Investments (id: Investments)
  - Financials (id: Financials)

- Balance (id: Balance)
- Investments (id: cop.prt.pflInvestments)
- Financials (id: cop.prt.pflFinancials)
- Balance (id: cop.prt.pflBalance)
- Gantt (id: Gantt)
- Life-cycle Funnel (id: Life-cycle Funnel)
- Planned Cost/Benefit (id: Cost/Benefit)
- Planned Costs (id: Budgeted Costs)
- Portfolio Planned ROI/Alignment Zones (id: ROI/Alignment Zones)
- Benefits by Goal (id: Benefits by Goal)
- Risk/Reward Quadrants (id: Risk/Reward Quadrants)
- Efficient Frontier (id: efficientFrontier)
- Portfolio (id: xid_prt_portInvDash)
- Prioritized List Chart
- Resource Demand on Investments [--Base Scenario–] (id: cop.pflPrioritizationResourceBase)
- Resource Demand on Investments [--Compare To Scenario–] (id: cop.pflPrioritizationResourceCompare)
- Prioritization of Investments [--Compare To Scenario–] (id: cop.pflPrioritizationInvestmentCompare)
- Prioritization of Investments [--Base Scenario–] (id: cop.pflPrioritizationInvestmentBase)
- Investment Gantt (id: cop.portfolioGanttResource)
- Portfolio Role Capacity and Demand (id: cop.pflRoleCapAlloc)
- Resource Capacity and Allocation (id: cop.pflResCapAlloc)
- Resource Allocation (id: cop.pflResAlloc)
- Capital vs Expense Variance by Period (id: cop.prt.pflFinCapExVarByPeriod)
- Capital vs Expense Budget and Forecast (id: cop.prt.pflFinCapExBdgtFrcst)
- Capital vs Expense by Period (id: cop.prt.pflFinCapExByPeriod)
- Key Performance Indicators (id: cop.portfolioPerformIndicator)
- Cost and Effort Performance (id: cop.portfolioFinPerformance)
- Portfolio Idea Vault (id: npd.prt.portIdeaVault)

- Prioritized Scored List of Projects (id: npd.prt.prioritizedScoreListofProjects)
- Competitive Comparison [Plan of Record] (id: npd.prt.CompetitiveComparisonPR)
- Role Capacity and Demand [Compare to Scenario] (id: npd.prt.portRoleCapDemandScen)
- Role Capacity and Demand [Plan of Record] (id: npd.prt.portRoleCapDemand)
- Product Financials (id: npd.prt.portInvFinancials)
- Product Market Growth (id: npd.prt.ProductMarketGrowth)
- Product Market Growth (plan of record) (id: npd.prt.ProductMarketGrowthplanofrecord)
- Product Financials (plan of record) (id: npd.prt.ProdFinancialsPlanofrecord)
- Ranking of Projects (id: npd.prt.portPrjRanking)
- Resource Demand on Projects (id: npd.prt.portResDemand)
- Projects (id: npd.prt.portfolioInvestments)
- Competitive Comparison [Competitors] (id: npd.prt.prodCompetitiveComparison)
- Stage Gate Review (id: npd.prt.portStageGateReview)
- Portfolio Benefits and Costs (id: cop.portfolioBenefitsCosts)
- Portfolio Investment Benefits by Goal (id: cop.portfolioInvestmentBenefitsByGoal)
- My Portfolios (id: cop.myPortfolios)
- Portfolio Revenue and Cost per Year (id: npd.prt.portfolioRevAndCostperYear)
- Brand Portfolios (id: npd.prt.brandPortfolios)
- Portfolio Revenue and Cost (id: npd.prt.RevAndCost)
- Master Portfolios (id: npd.prt.masterPortfolios)
- Projects In Development (id: npd.prt.productsInDevelopment)
- Scenario Toolbar (filter portlet)
- Service Portfolio (id: bup.servPortfolioITM)
- Service ROI (id: bup.serviceRoiITM)
- Service ROI (id: bup.provServiceROI)
- Portfolio Budget Status (id: bup.budgetStatusITM)
- Portfolio Budget Summary (id: bup.budgetSummaryITM)
- Cost Analysis (id: bup.providerServiceCostAnalysis)
- Cost Analysis (id: bup.serviceCostAnalysis)

- Data Providers:
  - Portfolio: All Investment Types (type: System)
  - Portfolio: Applications only (type: System)
  - Portfolio: Assets only (type: System)
  - Portfolio: Products only (type: System)
  - Portfolio: Projects only (type: System)
  - Portfolio: Services only (type: System)
  - Portfolio Financials Aggregation - v13 (type: Query)
  - Portfolio Investment Goals - v13 (type: Query)
  - Portfolio Investment Listing - v13 (type: Query)
  - Portfolio Investments Scorecard - v13 (type: Query)
  - Portfolio Listing (type: Query)
  - Portfolio Revenue and Cost (type: Query)
  - Portfolio Revenue and Cost per Year (type: Query)
  - Portfolios (type: System)
  - Brand Portfolios (type: Query)
  - InvestmentCostDataProvider (type: System)
  - ServiceRoiDataProvider (type: System)
- Database Objects (stock items only)
  - Tables:
    - PMA_PORTFOLIOS
    - PMA_PORTFOLIO_CONTENTS
    - PMA_PORTFOLIO_ROLES
    - PMA_EF_CANDIDATES
    - PMA_EF_INVESTMENTS
    - PMA_PINNED_INVESTMENTS
    - PMA_PRTFLIO_INCL_CTNT_TYPES
    - PMA_AGGR_VALUES
    - PMA_AGGR_KEYS

- PMA_AGGR_VALUES_VALIDITY
- RPT_PORTFOLIO_CONTENT
- PMA_FINANCIAL_VALUES
- PMA_PRIORITY_CHART_CONF

– Sequences (Oracle only)
  - PMA_PORTFOLIOS_S1
  - PMA_PORTFOLIO_CONTENTS_S1
  - PMA_PORTFOLIO_ROLES_S1
  - PMA_AGGR_VALUES_S1
  - PMA_PINNED_INVESTMENTS_S1
  - PMA_PRTFLIO_INCL_CTNT_TYPES_S1
  - PMA_AGGR_KEYS_S1
  - PMA_PRIORITY_CHART_CONF_S1

– Views
  - COP_FIN_ACT_PERIOD_CAPEX_V
  - COP_FIN_PERIOD_CAPEX_V
  - COP_FIN_PLAN_PERIOD_CAPEX_V
  - COP_PORTFOLIO_CNTS_BASE_V
  - COP_PORTFOLIO_CONTENTS_V
  - COP_PORTFOLIO_SCENARIO_V
  - XID_PORTFOLIO_CONTENTS_V
  - NPD_PORTFOLIO_CONTENTS_V

– Triggers
  - CAP_SCENARIO_MEMBERS_IUD_TRG1
  - CAP_SCENARIO_MEMBERS_U_TRG2
  - FIN_FINANCIALS_U_TRG1
  - FIN_FINANCIALS_U_TRG2
  - FIN_FINANCIALS_U_TRG3
  - INV_HIERARCHIES_IUD_TRG1
  - INV_INVESTMENTS_U_TRG1
  - PMA_PORTFOLIOS_U_TRG1

  - PORTFOLIO_ID column on CAP_SCENARIOS table
  - Procedure RPT_PORTFOLIO_CONTENT_SP and Package RPT_CAPACITYPKG
  - Functions:
    - PMA_CALC_PV_COST_FOR_INV
    - PMA_CALC_PRESENT_VALUE
    - PMA_TRUNC_MONTH_FCT
- Processes:
  - Communicate Scenario (Any copies made by the customer are left in place.)
- Add-ins (Portfolio-related content specified in the list):
  - PMO: New and upgrading customers.
  - NPD: New and upgrading customers.
  - BRM. New and upgrading customers.

Backup of Removed Portfolio Tables

After you upgrade to release 13.2, old portfolio information is not available in the general user interface. During the upgrade, information is backed up and maintained in tables within the CA Clarity PPM relational database management system.

The names of the backup tables are in the following format: XBKP_<ORIGINAL_TABLE_NAME>. In the XBKP table name prefix, BKP indicates a backup table. The X causes the table name to display at the bottom of the table list when viewed from a database client.

In common tables like ODF_FILTER_EXPRESSIONS, only records that are portfolio-related are backed up, not all records. The following table lists the names of backup tables and a description of the data they hold.

Backup Table	Description of Table Data
XBKP_PMA_PORTFOLIOS	Portfolio instances.
XBKP_PMA_PRTFLIO_INCL_CTNT_TYP	Investment types a portfolio contains (for example, projects or applications).
XBKP_ODF_FILTER_EXPRESSIONS	Power filters for the investment types a portfolio contains.
XBKP_PMA_PORTFOLIO_CONTENTS	Investments that a portfolio contains.
XBKP_PMA_PORTFOLIO_ROLES	Roles a portfolio contains.

Backup Table	Description of Table Data
XBKP_PMA_PINNED_INVESTMENTS	Investments that are *pinned* to a portfolio.
XBKP_PMA_EF_CANDIDATES	Efficient frontier candidate investments a portfolio contains
XBKP_PMA_EF_INVESTMENTS	Efficient frontier investments a portfolio contains.
XBKP_CAP_SCENARIOS	Scenario instances of a portfolio only (not other *general* scenario instances).
XBKP_CAP_SCENARIO_MEMBERS	Investments contained in a portfolio scenario.
XBKP_PMA_SCENARIO_CONSTRAINTS	Constraints posed on a portfolio scenario.
XBKP_PMA_SCENARIO_OPT_PARAMS	Optimization parameters defined on a portfolio scenario.

Chapter 9: Resource Management

Capacity Overview Portlet

The Capacity Overview portlet provides a high-level summary of the capacity, demand, remaining capacity, and the actual hours provided by any given unit in the organization from a Resource OBS hierarchical view. This page provides information both in an aggregated and detailed form using portlets. You can view the aggregated information on the Capacity Overview portlet and the detailed information in the following drill-down portlets:

- **Staff Allocation Overview portlet**

  Displays the resources for the selected OBS unit, their primary role, and their allocation over the same time periods that appear on the Capacity Planning Overview page.

- **Unfilled Roles portlet**

  Displays the unfilled role requests for the OBS unit, the investments that are requesting roles, and allocation information for the role requests.

- **Investment Demand portlet**

  Displays the investments that are associated with the OBS unit, the investment manager, start and finish dates for the investment, and the allocation of resources from the selected OBS.

Note: For more information about the Capacity Overview portlet, see the *Resource Management User Guide.*

Chapter 10: User Interface

This section contains the following topics:

New Keyboard Shortcuts (see page 49)
Keyboard Shortcuts for Time-Scaled Values (see page 49)
Time-Scaled Value Edits (see page 50)
New Group-by Feature for Charts (see page 50)
New Icon for Exports That Are In Progress (see page 51)
Bubble Chart Export Limited to 255 Data Series (see page 52)
Row Limit Governor for NSQL Queries (see page 52)

New Keyboard Shortcuts

The following keyboard shortcuts for lists are added in Release 13.2.

Action	Keyboard Combination
Move to the end of a row **Note**: If the action is on a TSV row, repeat the keyboard combination to leave the TSV section.	Ctrl+Right Arrow
Move to the beginning of a row	Ctrl+Left Arrow
Page up or down	Ctrl+Alt+Up Arrow Ctrl+Alt+Down Arrow
Move to the top or bottom of a list Note: If the action is in the TSV section of a list, repeat the keyboard combination to leave the TSV section.	Ctrl+Up Arrow Ctrl+Down Arrow

Upgrade Action: None

Keyboard Shortcuts for Time-Scaled Values

The following keyboard shortcuts for TSVs are added in Release 13.2.

Action	Key Combination
Select a TSV row	Shift+Ctrl+Right Arrow
Select a TSV column	Shift+Ctrl+Down Arrow

Action	Key Combination
Select a single cell to the left or right of the current cell	Shift+Right Arrow Shift+Left Arrow
Select a single row above or below the current cell	Shift+Up Arrow Shift+Down Arrow
Copy a TSV cell	Ctrl+c
Paste a TSV cell	Ctrl+v
Cut a TSV cell	Ctrl+x
Undo a cut, copy, or paste operation	Ctrl+z

Upgrade Action: None

Time-Scaled Value Edits

You can edit time-scaled values and scroll to different time periods in the grid. The edits you make are preserved even if they scroll offscreen. The edits persist until you save them or dismiss them without saving.

Upgrade Action: None

New Group-by Feature for Charts

The Group-by feature lets you narrow a chart result set based on an attribute that groups the results to provide a better display. The grouping feature is available for object data providers and portfolio system data providers. For example, for a column chart that shows Planned Costs by Project, the readability of the chart depends on the number of projects. Showing 500 projects along the X-axis or Y-axis does not provide a readable chart that scales to the amount of data available. If you group the column chart data by OBS, the chart result set is smaller and more readable.

The grouping feature uses the following chart property fields to control how the results are grouped and aggregated:

Group By Column

Defines the dimension attribute that controls how the chart results are grouped. For example, you can group data by attributes such as OBS, Stage, or Priority.

Group By Function

Defines the aggregation function that is applied to the chart metric. For example, for a column chart of Projects by Planned Costs, you can group by OBS and select *Planned Cost* as the chart metric. When the Group By column groups the results of the projects by OBS, the planned costs are aggregated based on the Group By Function selection. You can select the aggregation method for the chart metric using one of the following functions: Sum, Average, Count, Minimum, or Maximum.

Note: If you select a date value in the Group By field, you can only select a function of Maximum or Minimum for this field.

The following grouping type attributes (dimensions) are available:

- String
- Number
- Calculated
- Formula
- Boolean
- Lookup
- Virtual

You can use the Group-by feature for the following chart types:

- Bar
- Column
- Pie
- Line
- Area
- Funnel

Upgrade Action: None

New Icon for Exports That Are In Progress

A new loading icon displays when you export information to Excel or PowerPoint. Only one export at a time is allowed. While the icon is present, the export is in progress and you cannot request another export. When the export is complete and the icon is no longer present, you can request another export.

Bubble Chart Export Limited to 255 Data Series

When a bubble chart export exceeds 255 data series, an alert is sent and no file is downloaded. Excel and PowerPoint do not support charts with more than 255 data series.

Row Limit Governor for NSQL Queries

To reduce the chance of an NSQL query using too much of server resources, a row limit governor has been established for grid portlets, chart portlets, and cases where XOG query tags are used. The governor restricts the number of rows that are processed to 50,000. The row limit is applied in the following cases:

- Scenario 1: A portlet is running a single dimension NSQL data provider, and the portlet has an aggregation row defined.
- Scenario 2: A portlet is running a multidimensional NSQL data provider.

When the system detects Scenario 1, the product displays a warning message when the row limit governor has been exceeded. The results up to the row limit (including the aggregation row total) are processed. You can enter filter criteria to display the specific rows you want. This action reduces the number of rows in the result.

When the system detects Scenario 2, the product displays a warning message when the row limit governor has been exceeded. For this scenario, the system does not display any results or aggregation row totals. Because of the nature of multidimensional NSQL queries, the correct result set or aggregation row cannot be determined.

Upgrade Action: None

Chapter 11: XML Open Gateway Changes

This section contains the following topics:

New XOG Setting to Preserve OBS When Installing an Add-in (see page 53)
Invalid Partition Codes in Imports (see page 53)

New XOG Setting to Preserve OBS When Installing an Add-in

A new flag named *complete* has been added. When the flag value is set to *preserveOBS,* it prevents the deletion of the OBS section of property views during an add-in installation. The flag default value is *false*. If both of the following items are true, the flag is required:

- The add-in that you are installing updates the property view of an object that can be associated with an OBS.
- The version in the XML file is 13.2 (<Header action="write" externalSource="NIKU" objectType="contentPack" version="13.2.0"/>).

If the XOG version is from a release earlier than Release 13.2, the OBS section is not deleted.

Upgrade Action: None

Invalid Partition Codes in Imports

Release 13.2 changes how invalid partition codes are handled when data is being imported into the XOG. Invalid partition codes now cause the following actions to occur:

- The instance record is saved with a warning indicating that the partition_code attribute has an invalid value.
- The created instance is assigned to the user's default partition. The default is specified in Account Settings.
- The auto numbered ID value is generated from the scheme of the user's default partition.

Before this release, when an object instance with an invalid partition code was imported, the following actions occurred:

- The instance record was saved with a warning indicating that the partition_code attribute had an invalid value.

- The created instance record contained the invalid partition code value.
- The auto numbered ID value was generated from the system partition (NIKU.ROOT) scheme.

Chapter 12: Data Model Changes

This section contains the following topics:

Added Tables (see page 55)
Updated Tables (see page 56)
Dropped Tables (see page 60)

Added Tables

The following list shows tables added for Release 13.2.00.

Note: Added tables with the identifier XBPK are not included in the list. These tables are backup tables for the Portfolio feature removed for this release.

- CMN_INSTANCE_RANK
- CMN_RANK_CONTEXTS
- PFM_APPLICATIONS
- PFM_APPLICATIONS_PLAN
- PFM_ASSETS
- PFM_ASSETS_PLAN
- PFM_ATTR_REGISTRY
- PFM_BASELINE_DETAILS
- PFM_CA_FINANCIALS
- PFM_CA_NPIOFINPROPERTIES
- PFM_CLOB_CURVES
- PFM_CONTENT_FILTERS
- PFM_EV_HISTORY
- PFM_FINANCIALS
- PFM_FLAT_HIERARCHIES
- PFM_HIERARCHIES
- PFM_IDEAS
- PFM_IDEAS_PLAN
- PFM_INVESTMENTS

- PFM_INVESTMENTS_PLAN
- PFM_MNT_PROJECTS
- PFM_OTHERS
- PFM_OTHERS_PLAN
- PFM_PINNED_INVESTMENTS
- PFM_PLANS
- PFM_PORTFOLIOS
- PFM_PRODUCTS
- PFM_PRODUCTS_PLAN
- PFM_PROJECTS
- PFM_PROJECTS_PLAN
- PFM_ROLE_CAPACITY
- PFM_ROLE_DEMAND
- PFM_ROLE_DEMAND_PLAN
- PFM_SERVICES
- PFM_SERVICES_PLAN
- PFM_USER_SELECTED_PLAN
- PFM_WEIGHTING_ATTRS
- PFM_WEIGHTING_OPTS
- RPT_INV_HIERARCHY
- RPT_RES_SKILLS_FLAT
- RPT_RES_SKILLS_INDEX

Updated Tables

The following list of tables indicates what changed in the update:

CAP_SCENARIOS

Dropped column:

PORTFOLIO_ID

Dropped index:

CAP_SCENARIOS_N2

CMN_AUDITS

Added columns:

CLASS_CODE

TRANSACTION_ID

Updated column:

ATTRIBUTE_CODE

CMN_AUDITS_TSV

Updated column:

ATTRIBUTE_CODE

CMN_GG_ITEMS

Added column:

GROUP_BY_FUNCTION

CMN_GRAPHS

Added columns:

GROUPBY_COL_CODE

DEFAULT_GROUP_BY_FUNCTION

CMN_GRIDS

Added columns:

SNAP_TO_WATERLINE

OBJECT_INSTANCE_ID

Updated index:

CMN_GRIDS_U1

FIN_COST_PLAN_DETAILS

Added column:

COST_TYPE_ID

Updated index:

FIN_COST_PLAN_DETAILS_U1

FIN_FINANCIALS

Added columns:

BUDGET_ACTUAL_BENEFIT

BUDGET_ACTUAL_BENEFIT_TOTAL

BUDGET_COST_CAPITAL

BUDGET_COST_OPERATING

BUDGET_CST_CAPITAL_TOTAL

BUDGET_CST_OPERATING_TOTAL

ODF_SS_BUDGET_ACTUAL_BENEFIT

ODF_SS_BUDGET_COST_CAP

ODF_SS_BUDGET_COST_OP

ODF_SS_PLAN_ACTUAL_BENEFIT

ODF_SS_PLAN_COST_CAP

ODF_SS_PLAN_COST_OP

PLANNED_ACTUAL_BENEFIT

PLANNED_ACTUAL_BENEFIT_TOTAL

PLANNED_COST_CAPITAL

PLANNED_COST_OPERATING

PLANNED_CST_CAPITAL_TOTAL

PLANNED_CST_OPERATING_TOTAL

Added indexes:

FIN_FINANCIALS_GN1

FIN_FINANCIALS_GN2

FIN_FINANCIALS_GN3

FIN_FINANCIALS_GN4

FIN_FINANCIALS_GN5

FIN_FINANCIALS_GN6

ODF_AUDITED_ATTRIBUTES

Updated column:

ATTRIBUTE_CODE

PAC_MNT_PROJECTS

Added column:

COST_TYPE

PPA_TRANSCONTROL

Added column:

COST_TYPE

PPA_TRANSWIPADJUST

Added column:

COST_TYPE

PPA_WIP

Added column:

COST_TYPE

PRTASK

Added column:

COST_TYPE

Added index:

PRTASK_N6

PRTEAM

Added column:

CAPITAL_PERCENTAGE

Added index:

PRTEAM_N3

PRTIMEENTRY

Added column:

ODF_SS_ACTUALS

Added index:

PRTIMEENTRY_GN1

TEMP_IMP_VALIDATE_TRANSIMPORT

Added column:

COST_TYPE

Dropped Tables

The following tables were dropped for Release 13.2.00:

- PMA_AGGR_KEYS
- PMA_AGGR_VALUES
- PMA_AGGR_VALUES_VALIDITY
- PMA_EF_CANDIDATES
- PMA_EF_INVESTMENTS
- PMA_FINANCIAL_VALUES
- PMA_PINNED_INVESTMENTS
- PMA_PORTFOLIO_CONTENTS
- PMA_PORTFOLIO_ROLES
- PMA_PORTFOLIOS
- PMA_PRIORITY_CHART_CONF
- PMA_PRTFLIO_INCL_CTNT_TYPES
- RPT_PORTFOLIO_CONTENT