

CA Clarity™ PPM

PMO Accelerator Release Notes - On Premise

Release 03.2.00



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Contents

| | |
|---|----|
| Chapter 1: Welcome to PMO Accelerator | 7 |
| What's New in Release 3.2 | 8 |
| New and Improved Portlets | 9 |
| Attribute Overwrite..... | 11 |
| View Protection | 12 |
| Reports No Longer Supported | 18 |
| Subobjects and Portlets No Longer Supported | 19 |
| Access Groups No Longer Supported | 20 |
| Chapter 2: Installation Information | 21 |
| Install the Add-In | 21 |
| Add-In Items Automatically Applied | 23 |
| Review the Add-In Items | 29 |
| Apply the Add-In Items..... | 30 |
| CA Best Practices Accelerator | 31 |
| Install PMO Accelerator Sample Data | 32 |
| Chapter 3: Certified and Supported Versions | 33 |
| Chapter 4: Localization | 35 |
| Chapter 5: Documentation | 37 |
| Chapter 6: Additional Resources | 39 |
| Known Issues | 39 |
| Contacting Technical Support | 39 |
| Chapter 7: Upgrade Information | 41 |
| PMO Release 3.1 to PMO Release 3.2 Upgrade | 41 |
| PMO v3.0 to Release 3.1 Upgrade | 48 |

Chapter 1: Welcome to PMO Accelerator

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 | |

| Portlet Name | New | Improved |
|---|-----|----------|
| 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 23).

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 30) 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 | | |

| Object Name | View | PMO v3.0 | PMO Release 3.1 | PMO Release 3.2 |
|----------------------|---------------------------------|----------|-----------------|-----------------|
| | 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: Installation Information

Install the Add-In

Install the PMO Accelerator add-in on your CA Clarity application server so that the content is available to you. The PMO Accelerator add-in is included with the CA Clarity PPM product and is ready for installing. In prior releases, you had to download the add-in installer from the support site, but this is no longer necessary.

If you are upgrading from a previous Clarity release, with the PMO Accelerator installed, you must also upgrade the PMO Accelerator. Review the certified and supported versions chart to see the version of the add-in that must be installed with the Clarity version.

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

The following steps explain how to install the PMO Accelerator add-in on your CA Clarity application server.

Follow these steps:

1. Stop the services.
2. Execute the install script.
3. Start the services.

Stop the Services

Before installing the add-in, stop the CA Clarity PPM Application (app) and CA Clarity PPM Background (bg) services. Stop the services from the Clarity System Administration. See the CA Clarity PPM Installation Guide for information about stopping CA Clarity PPM services.

Execute the install script

The following procedure installs lookups, queries, portlets, pages, views, processes, groups, resource roles, project templates, and database objects.

Important! Back up your CA Clarity PPM installation before installing this add-in so that you can restore the application to the prior version, if necessary. Once you have installed the add-in, you cannot uninstall it.

Follow these steps:

1. Open a command prompt and navigate to the CA Clarity PPM runtime bin directory.
2. Enter the command:
`admin content csk`

The installation process begins and information displays on the screen. The information is captured and stored in the admin.log file that is located in the logs directory. The output files are stored in the logs/content/xog/csk directory.

3. Review the screen output and the logs for important information after the installation completes.

Start the Services

After installing the add-in, start the CA Clarity Application (app) and CA Clarity Background (bg) services. Start the services from Clarity System Administration. See the *CA Clarity PPM Installation Guide* for information about starting CA Clarity services.

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> |
| PMO-Project Status | Page | <p>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.</p> |

| Name | Type | Description |
|-----------------------------|---------|---|
| 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 | <p>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).</p> |
| 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>Note: This portlet is available from the Posted Transaction Review page in the menu.</p> |
| 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.</p> <p>Note: This portlet is available as a cost plan detail object action.</p> |

| Name | Type | Description |
|--------------------------------|---------|---|
| 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). |
| 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. |

| Name | Type | Description |
|---------------------------------|-------|---|
| 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. |
| 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. |

| Name | Type | Description |
|------------------------------------|-------|---|
| 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. |
| 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. |

| Name | Type | Description |
|------------------------------------|-------|---|
| 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. |
| 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. |

| Name | Type | Description |
|-----------------------------|-------|---|
| 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 41) 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 48) 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 41).

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.

Install PMO Accelerator Sample Data

You can install the PMO Accelerator sample data to see and use examples of the functionality of CA Clarity PPM.

Important! Sample data is strictly for test or development environments. Do not install the sample data on your production CA Clarity PPM server. Installing the data on a CA Clarity PPM server that contains data may produce a failure, overwrite existing data, or both. After you install the sample data, you cannot remove it.

Before installing the add-in sample data, set up the system currency to USD and stop the CA Clarity Application (app) and CA Clarity Background (bg) services.

Follow these steps:

1. Log in to CA Clarity as admin, or as any user with Financial Maintenance - Financial Management and Financial Maintenance - Financial Organizational Structure global access rights.
2. Open Administration, and from Finance menu, click Setup.
The financial management defaults page appears.
3. Select currency as USD and save it.
4. Log in to CA Clarity System Administration.
5. Open Home, and click All Services.
6. Select the CA Clarity Application (app) and the CA Clarity Background (bg) check boxes.
7. Click Stop.
8. If you are using Oracle WebLogic or IBM WebSphere, stop CA Clarity System Administration and applications using the application server administration console.
For more information, see the J2EE vendor documentation.
9. Open a command prompt and navigate to the CA Clarity PPM runtime bin directory.
10. Enter the following command to install the sample data:
`admin content-demo csk`
The installation process begins and information displays on the screen. The output files are stored in the logs/content/xog/csk directory.
11. Review the screen output and the logs for important information after the installation completes.

Chapter 3: Certified and Supported Versions

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

| CA Clarity Version | Add-In Version |
|------------------------------|----------------|
| 13.2 | 3.2 |
| 13.1 | 3.1 |
| 13.0 | 3.0 |
| 12.1 | 2.2 |
| 8.1.5/CA Clarity PPM v12.0.6 | 2.1.1 |
| 8.1.5/CA Clarity PPM v12.0.5 | 2.1 |
| 8.1.5 | 2.0 |
| 8.1 Service Pack 2 | 1.3 |
| 8.1.1 | 1.2 |

Important! The upgrade from PMO v1.2 to PMO v3.0 is not a valid upgrade path. If you have PMO v1.2 installed, you must upgrade to PMO Release 3.1 or PMO Release 3.2.

The upgrade from versions prior to PMO v1.2 need to patch the COP_PROJECT_ROLLOUP_V database view to remove references to the PRBASESUM column of the PRASSIGNMENT table before upgrading to PMO Release 3.2. Contact technical support to obtain a patch.

Chapter 4: Localization

The user interface is available in the following supported languages:

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

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

Chapter 5: Documentation

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

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

Chapter 6: Additional Resources

Known Issues

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

Contacting Technical Support

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

Web address:

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

Telephone numbers:

North America: 1 888 550 6458

Europe: 44 08459 888788

Asia Pacific: 61 3 9821 3000

Chapter 7: Upgrade Information

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 |

| Name | Type | Description | Action |
|--|---------|--|--------|
| 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 |

| Name | Type | Description | Action |
|------------------------------------|-------------|--|--------|
| 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. PROGRAMSCHEDULEDASHBOARD.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 |