CA Clarity™ PPM

Change Impact and Upgrade Guide - On Demand

Release 13.3.00

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Contents

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, review the *Change Impact and Upgrade Guide* for the 13.0, 13.1, and 13.2 releases. If you are upgrading from Release 13.2 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 13.3

This section provides information about upgrade changes for Release 13.3.

Java 7

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

- XML Open Gateway (XOG) client
- Service Connect

Starting with Release 13.3, CA Clarity PPM provides a specific Java Runtime Environment (JRE) for the following clients.

- Open Workbench
- Connector for Microsoft SharePoint

The JRE is copied to the hard drive in the installation directory on the end-user workstation. The JRE is used specifically for the clients and is independent of the JRE used for the Windows workstation.

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 for which CA Clarity PPM does not provide the JRE.

Add-ins Compatibilities

The following section describes important information about upgrading installed add-ins, accelerators, and connectors for Release 13.3.

- If you are upgrading from Version 13.0, Release 13.1, or Release 13.2 to this release, the following add-ins are upgraded, if deployed:
  - PMO Accelerator
  - Clarity Solution Pack (CSP)
  - Clarity Agile
  - Connector for Microsoft SharePoint
- If you are upgrading from any version before Version 13.0 to Release 13.3, all installed add-ins are upgraded.

The following table shows the accelerator and connector releases that are installed with Release 13.3.

Accelerator or Connector	**Upgraded Version**
PMO Accelerator	3.3.0
Clarity Solution Pack (CSP)	3.3.0
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	3.0.0
Service Connect	2.0.0
Catalyst Connector	2.5.0
CA Clarity Agile	13.3

Reports

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 13.3.

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 13.3 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.

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 13.3.

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

Upgrade Action: As part of your Clarity 13.3 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 13.3 universes are installed.
- If you previously purchased the GSE Universes from CA Services, these universes are not overwritten by the Release 13.3 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 "Reports (see page 11)."

  Manually reschedule the scheduled reports. The scheduled reports that were configured before the upgrade to Release 13.3 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 13.3 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 13.3 universes are installed.
- If you previously purchased the GSE Universes from CA Services, these universes are not overwritten by the Release 13.3 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 "Reports (see page 11)."

  Manually reschedule the scheduled reports. Scheduled reports that were configured before the upgrade to Release 13.3 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 SP1 (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 13.3 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 13.3.
   - 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 13.3 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=13.3 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.

Known Issues

This section provides known issues for CA Clarity PPM.

Gantt Printing Issue with Chrome Browser

If you use a Chrome browser, the following issues can occur when you print a Gantt chart:

- Some rows have extra space after the row.
- Some lines break across pages, presenting part of the line on two pages.
- The Gantt schedule lines do not appear correctly.

This issue does not occur in Internet Explorer or Firefox.

Google Chrome Version 30.0.1599.66 m Issues

The following CA Clarity PPM issues occur for users who are using this particular version of Chrome (Version 30.0.1599.66 m):

- The Recent Pages (History) drop-down that lets you navigate back to previously viewed pages does not work.
- Export to Excel and Export to PowerPoint do not work at the portlet level.
- Export to Excel does not work on a list page.

These issues do not appear in other browsers and have been found only in this version of Chrome.

Update Operation For Some Project Object Attributes Does Not Appear in the Audit Trail

In some instances, when auditing is enabled for specific attributes on the Project object, only the insert operation is reported in the audit trail. The update operation does not show for the attributes. The affected attributes include:

- Budgeted Capital Cost
- Planned Capital Cost
- Budgeted Operating Cost
- Planned Operating Cost

Documentation Changes

The CA Clarity PPM documentation has been improved with these changes to help you find information faster.

- **CA Answer Bar**. Quickly find the CA Clarity PPM information you need using the CA Answer Bar (https://enable.ca.com/answers/us/CA-Clarity-PPM). Find the latest "how to" scenario content, discover great insights from CA Support, and more. You'll spend less time searching and more time focused on getting your job done. Technical content is available for CA Clarity PPM 13.0 and above.
- **CA Clarity PPM Cookbook**. Select CA Clarity PPM technical content is available on the mobile device platform Flipboard. Watch this video and use the cookbook today. Happy flipping!
  - To add the CA Clarity PPM Cookbook to your RSS feed folder, add this URL: http://cookbooks.ca.com/cacppm/?feed=rss2
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- **Online Help Bookshelf**. To help simplify and improve how you find content, the bookshelf available from the product only includes the product documentation. Additional information such as release notes, green books, KB articles, social media, and so forth is available in the On Premise and On Demand bookshelves on CA Support Online.
- **New Portfolio Management Scenarios Guide**. Provides "how to" scenario content the Portfolio Manager needs.

- **New Portlet Reference Guide**. Provides a list and details for all out-of-the-box portlets and PMO Accelerator portlets.
- **Accelerator, Add-in, and Connector Guides**. To help improve how you find content, the release notes for the accelerators, add-ins, and connectors are now found in their associated product guide.
- **Basics User Guide and Personalizing CA Clarity User Guide**. To help improve how you find content, the content in the *Personalizing CA Clarity User Guide* is now found in the *Basics User Guide*.
- **Access Rights Reference Guide**. To help improve how you find content, the access rights for all the guides are now found in the *Access Rights Reference Guide*. They are no longer included in the individual guides.
- **XML Open Gateway Developer Guide**. The element syntax *IsComplete* and *completed* were recognized as deprecated forms and are replaced by *complete*. For example, when true, the optional *complete* element for the OBSAssocs element indicates that any OBS associations represent a complete replacement as a set. When the value is false, the operation inserts and/or updates any existing OBS associations. Sample content including sample .xsd files may continue to show the old forms. The documentation reflects this recognition of a single standard in topics that include the *complete* element with the following note:

  Note: *Complete* replaces deprecated forms *completed* and *IsComplete*.

Chapter 3: Administration

This section contains the following topics:

License Type Names Have Changed

When the License Information portlets were first introduced in Release 12.1, the License Type Names were defined as:

- Managers
- Team Members
- Enterprise Visibility Option

Effective with Release 13.2 Generic Patch 4 and Release 13.3, the labels for the License Type names are changing. The functionality and use remain the same.

Old Name	New Name	Functionality
Managers	Full	Users have the full use of product functionality.
Team Members	Restricted	Users have specified limited use of product functionality.
Enterprise Visibility Option	View Only	Users can view information but cannot create or edit information except for ideas and incidents.

One extra user type is available for customers who own CA Clarity Agile. Vision Timesheet users have the right to enter time through the CA Clarity PPM and Agile Vision integration. All users are named, not concurrent. Only active users are counted as licensed users.

To see the new user types, open the Administration menu, and under Organization and Access, click License Information.

Upgrade Action: None

Process Monitor

A process monitor has been added to CA Clarity PPM. The monitor ensures certain process types that are known to cause systemic problems are identified and put on hold automatically to prevent a system interruption. A message displays on the process validation page for processes that are flagged as problematic by the process engine.

Upgrade Action: None

Changes to the Global Audit Trail Page

The Global Audit Trail page was updated for this release. This page is available in the Data Administration section of the Administration menu. The updates do not affect the instance audit trail pages available to users.

The following updates were made:

- The Date Range fields now default to the following range:
  - The start date is seven days before the current date.
  - The end date is the current date.
- The Date Range default values appear when the following actions occur:
  - The Global Audit Trail page is opened.
  - An administrator tries to filter without entering any filter values.
  - The selection in the Object field is changed.
- The Show All button was removed from the page.

Upgrade Action: None

Chapter 4: Add-in Enhancements

This section contains the following topics:

CA Microsoft Project Interface Changes

The following Release 13.3 changes were made for the Microsoft Project Interface:

Resource Leveling

The CA Microsoft Project Interface supports the Microsoft Project Resource Leveling feature. If you do resource leveling in Microsoft Project and save the project into CA Clarity PPM, the resource leveling information is kept in the CA Clarity PPM database. The next time that you open the project in Microsoft Project from CA Clarity PPM, the resource leveling information that you entered is available.

Note: See the Microsoft Project documentation for more information about resource leveling.

Performance Tuning

The Microsoft Project Interface was tuned to improve performance in the following areas:

- Exporting a project from CA Clarity PPM to Microsoft Project
- Importing a project from Microsoft Project to CA Clarity PPM

Smaller projects show performance improvements for the import and export actions. Projects that have large time-scaled value data such as Assignment Actuals and ETC, or Baseline Cost and Usage Curve may not show the expected improvement.

Java Runtime Environment Is Provided

CA Clarity PPM provides a specific Java Runtime Environment (JRE) for use by Microsoft Project. The JRE is copied to the hard drive in the Microsoft Project Interface installation directory on the end-user workstation. The JRE is used for the Microsoft Project Interface integration and is independent of the JRE used for the Windows workstation.

The Microsoft Project Interface uses only the internal JRE version that is provided which we certify to be compatible. This approach eliminates issues that arise when the workstation Windows installation of the JRE is not the correct version or the JRE is missing. An IT department no longer has to update a JRE version when deploying the Microsoft Project Interface.

Silent Installation Support

In this release, the Microsoft Project Interface can be installed silently without any user intervention.

In previous releases, when you ran the Microsoft Project add-in setup, the Windows operating system displayed a message that the publisher could not be verified. You were then asked if you wanted to install the customization.

This message is no longer displayed. You receive a confirmation message after the add-in is successfully installed. The Microsoft Project Interface add-in setup closes the installer window automatically.

Connector for Microsoft SharePoint Changes

The Microsoft SharePoint Connector Release 3.0.0 is new. If you have the Connector for Microsoft SharePoint Release 2.0.2 or earlier installed, you cannot upgrade the existing connector. You are required to install the new Release 3.0.0 connector. The existing connector was based on SharePoint 2010, and the new Release 3.0.0 connector is based on SharePoint 2013.

Chapter 5: Demand Management

Financially Enabled Ideas

This release includes financially enabled ideas. The changes include:

- The ability to create cost plans, benefit plans, and budget plans for an idea.
- A Financial Plans tab for any idea that you open in CA Clarity PPM. This tab provides access to cost plans, benefit plans, and budget plans for the idea.
- New access rights for the following Idea pages: Financial (subpage), Cost Plan, Benefit Plan, and Budget Plan.
- A new check box named *Copy Financial Plan and Properties* on the conversion page for an idea. The conversion page lets you convert an idea into an investment. The check box lets you copy the financial data from an idea to a target investment.
- New views for the Idea Cost Plan object which make the Actual attributes unavailable to add to the view.
- New views added for the Idea Benefit Plan Detail object which make the Actual attributes unavailable to add to the view.
- The configuration of workflow processes on idea cost plans.

The following limitations exist for a financial plan on an idea:

- Actuals using transactions are not possible.
- Only a manually created cost plan (plan of record) can be converted to a target investment. A cost plan that you create using the methods *Populated from Investment Team* or *Task Assignment* is not converted.
- A budget plan will not be converted to a target investment.
- A workflow system action is not available to convert an idea financial plan to a target investment. An idea financial plan can only be converted through the user interface.

Upgrade Action: None

Chapter 6: Financial Management

Inactive Resources in Cost Plan Population

Starting with Release 13.3. information for both active and inactive resources appears in cost plan detail and is used for the rate calculation. The values for resource attributes are pulled for the rate calculation regardless of the active status if the attributes are specified in the resource profile.

For example, if the transaction class is defined for a resource, the resource transaction class appears in the cost plan. The transaction class is used to pull the rate from the rate matrix. Setting the resource to inactive on the general properties page or the financial properties page does not change this behavior.

If a resource has no defined transaction class but the resource has project allocation, ETC, or actuals, the rate is pulled from the rate matrix. The active status does not change this behavior.

Upgrade Action: None

Chapter 7: Open Workbench

Java Runtime Environment for Open Workbench

Starting with Release 13.3, CA Clarity PPM provides a specific Java Runtime Environment (JRE) for use by Open Workbench (OWB). The JRE is copied to the hard drive in the OWB installation directory on the end-user workstation. The JRE is used specifically for OWB and is independent of the JRE used for the Windows workstation.

OWB uses only the internal JRE version that is provided which we certify to be compatible. This approach eliminates issues that arise when the workstation Windows installation of the JRE is not the correct version or the JRE is missing. An IT department no longer has to update a JRE version when deploying OWB.

Chapter 8: Portfolio Management

This section contains the following topics:

Portfolio Maximums for Investments, Roles, and Attributes

To ensure better performance and usability, the following limits apply to the maximum number of investments, roles, and attributes that you can include in a portfolio:

- Investment attributes: 700
- Investments: 250
- Roles: 25

Upgrade Action: None

Aggregation Rows Added to the Portfolio Waterlines View

The Portfolio Waterlines view has been enhanced to display the aggregated time-varying totals for selected constraints. The time-varying values for the individual investments can also be displayed overlaying the Gantt bars for a selected constraint.

Upgrade Action: None

Chapter 9: Project Management

This section contains the following topics:

Gantt View Can Be Printed

You can now print a Gantt view. The Printable View icon on the Gantt chart displays a read-only view of the tasks you want to print in a new window. You can view a maximum of 300 tasks at a time. The page height automatically fits the tasks, and the page width automatically fits the column and period configuration.

Before you print the Gantt view, select the background colors and images option in the browser menu.

Browser	Action to Take
Internet Explorer, Firefox	Use the Page Setup option in the browser menu.
Google Chrome	Use the Print option in the browser menu.

Note: Use the Alt key to enable the browser menu for Internet Explorer and Firefox.

Upgrade Action: None

Task Duration on the Gantt View Is Editable

In previous releases, the task Duration on the Gantt view was automatically calculated. The duration was based on the task Start Date and Finish Date on saving. Starting this release, you can edit the task duration on the Gantt view and can see the changes interactively.

However, you cannot edit the task duration in the following cases:

- When a task is a Milestone or Summary Task.
- Timesheet is already submitted for that period.

The following table shows the interactive changes that you see when you edit the task attributes on the Gantt view:

Field Edited	**Result**
Task Duration	The task Finish Date and the Gantt bar change.
Task Finish Date	The task Duration changes.
Task Start Date	The task Finish Date changes, but the task Duration does not.

Note: For more information about editing the Task Duration field, see the *Project Management User Guide*.

Upgrade Action: None

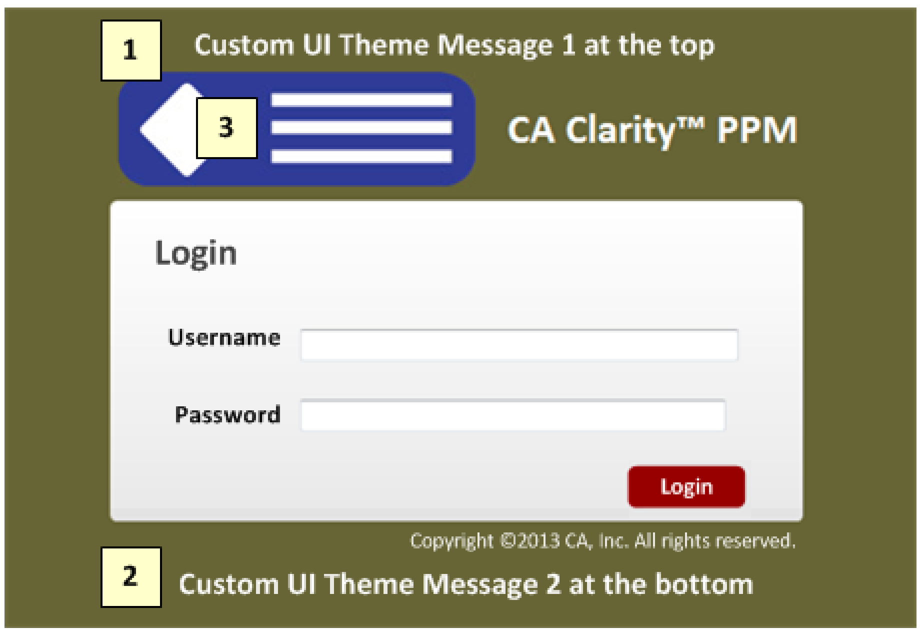
Chapter 10: User Interface

This section contains the following topics:

CA Clarity PPM Login Page Can Be Rebranded

You can use the UI theme CSS to customize the appearance of the login page. For example, set a custom logo for an organization or set a message for all users to view when they log in. A sample system maintenance message appears as follows:

```
The system will be unavailable from Sun April 15 at 11:30 pm until Mon April 16
at 3:30 am.
```



1. Login Page Top Message

You can add a service announcement or custom message at the top of the login page.

2. Login Page Bottom Message

You can add a service announcement or custom message at the bottom of the login page.

3. Login Page Logo

You can insert a custom logo on the login page.

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

Upgrade Action: None

Bubble Chart Improvement

Starting with Release 13.3, the bubbles in a bubble chart are translucent. This change allows smaller bubbles that appear behind larger bubbles to be viewed. Previously, smaller bubbles were not visible when hidden because the bubbles appeared as solid objects in the chart.

Upgrade Action: None

Drop-down List with More Than 20 Values

A drop-down list that exceeds 20 values for a field changes from a drop-down list to a browse lookup. The browse lookup is easier to use when the list of values is long.

Upgrade Action: None

Export Level for Excel and PowerPoint Has Changed

Before this release, an export to Excel or PowerPoint exported portlet information for all tabs for a selected page. With Release 13.3, only information that is on the selected tab is exported. Exporting the portlet information for a tab is the default behavior.

Chart Y-Axis Field Option Change

The Y-Axis unit of measure for the Major Unit Increment field is *days* when the Y-Axis for a chart represents date data.

Chapter 11: XML Open Gateway (XOG) Changes

XOG Governor Limit

When you import or export a large number of instances through XOG, you may encounter Out of Memory (OOM) or time-out exceptions. To handle these issues, you can now configure the Maximum XML Nodes option available under the Application tab in the CSA. The Maximum XML Nodes is referred as nodes limit in the document. The default value for the Maximum XML Nodes is 150,000 for both the On-Demand and On-Premise environments.

Before this release, for a XOG read request, the entire requested information was sent in a single response which resulted in the OOM or time-out exceptions. Starting this release, the server processes the instances until the node limit is reached. After processing the response is sent back to the client in chunks using pagination. A new read request should be sent to the server with the appropriate information using pagination for the next set of instances. The number of the processed instances for a read request is updated in the skip element of the XOG output.

When you import instances, the server processes 20 instances per iteration. If the node limit is reached even before the 20 instances are loaded, the server processes only those instances that have loaded until that point for the current iteration. The remaining instances are considered automatically for the next iteration.

Note: For more information about setting the XOG Governor limit, see the *XML Open Gateway Developer's Guide*.

Upgrade Action: None

Chapter 12: Data Model Changes

This section contains the following topics:

Added Tables

The following table was added for this release: CMN_GEL_TAGS.

Note: See the *Technical Reference Guide* for information about this table.

Updated Tables

The following list of tables indicates what changed in this release:

CMN_AUDITS

Dropped column:

CLASS_CODE

Added index:

CMN_AUDITS_N6

CMN_SEC_USERS

Added column:

SALT

PRJ_BLB_SLICES

Dropped columns:

ID

CREATED_BY

LAST_UPDATED_BY

LAST_UPDATED_DATE

UNIT

PRTASK

Added columns:

PRMSPWBSLEVEL

PRMSPWBSSEQUENCE

Dropped Tables

No tables were dropped in this release.