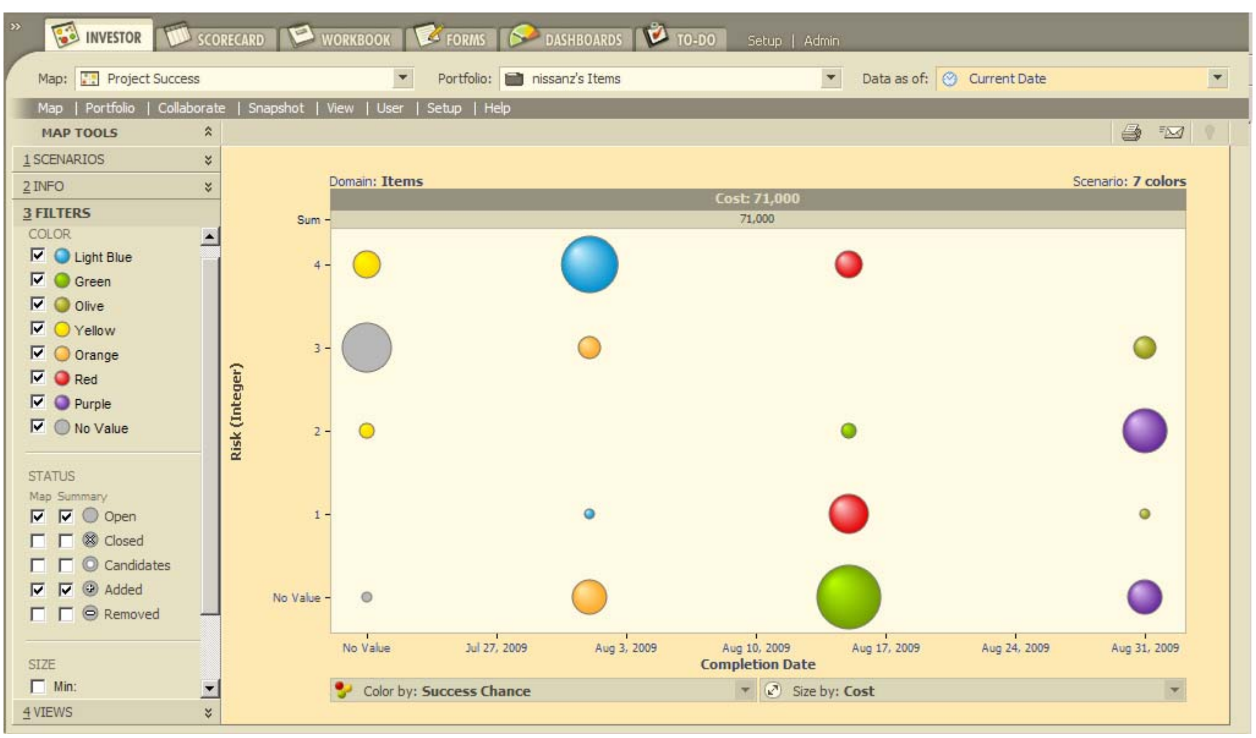
ORACLE®

PRIMAVERA

Primavera Portfolio Management 8.0
What's New



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Overview

Versioning

It is now possible to display and input historical and future data in all of the main PPM modules. The end-user can select the date of the data to be displayed, via a new *Data as of* navigation control found at the top-right of the Investor Map, Scorecard, Forms and Dashboards modules. The configurator can determine the date or version of the data to be displayed, by setting the various *Data as of* date controls for the categories in the aforementioned modules. Important and meaningful dates can be saved as Versions for easy re-use when configuring the system.

More details...

Additional, Customizable Category Indicator Colors & Shapes

Primavera Portfolio Management 8.0 supports the customization of category indicator colors, shapes and names. Between two to seven indicator colors and shapes may be selected from a palette of 16 different colors and seven different shapes. This customized list of indicators is used in every category indicator display and input. (The non-category based Life cycle Phase Health and Investor Map Gap Indication still use the non-customizable Green star, Yellow diamond and Red circle indicator scheme.) Basic Indicator functions can be defined on any subset of the currently enabled set of category indicators. Reports are available to predict the affects of disabling or re-enabling indicators on all Basic and Advanced indicator functions.

More details...

Function Engine scale-out

The Primavera Portfolio Management analytics engine can now be hosted on multiple PPM back-end servers. This combined with the fact that the PPM application is already hosted on multiple Front-End servers in a Network Load Balancing (NLB) environment means that PPM supports true transaction-based load balancing (no “sticky session”).

More details...

Domain-sensitive Form / Dashboard Navigation & Selection

Forms and Dashboards can now be linked to a specific domain, and be selected only when Items or Portfolios of that same domain (or of no particular domain) are being viewed.

More details...

Regional Support for German (Switzerland) Locale

Regional support for German (Switzerland) has been added to Primavera Portfolio Management 8.0. This means that the decimal and digit grouping symbols, long and short date formats and date separator reflecting German (Switzerland) usage can be defined for the system on the administrative level, and then be subsequently selected by an end-user.

More details...

Investor Map Upgrade

The Investor Map has been completely re-written without Java thereby eliminating the need for Java to be installed on the client workstation. As part of this re-write, all of the Scenario (formerly Version) management tools, data Info display per Item, Filtering and Viewing functionality have been re-organized in an accordion-style control called Map Tools. Separate regions in the map have been delineated for Items whose X-axis and Y-axis have No Value. Similarly Items whose Size by categories have a negative value or No Value, are displayed distinctly from those who have positive values for this category. The "smart scatter" of bubbles whose X-axis or Y-axis value list values are identical, can now be neutralized, so that these bubbles will be aligned along the same line. This is all in addition to the aforementioned Versioning and Customizable Indicator support which has been added here as in the other modules.

More details...

Sub-item Security

Security of the sub-item entity itself is now defined together with the Workbook security (Deliverables, Action Items, Links, Contacts and Documents). This affects the ability to view the sub-item, edit and re-order it, create and remove it, and setting its security. These permissions are now granted separately for Portfolios and Items. The sub-item data is now also defined separately for Portfolios and Items, with each being set in their respective Data areas.

More details...

Alerts

The Category Value Condition Met and the Category Indicator Condition Met alerts will now be triggered not only by the data of the Items or Portfolios defined in their Scope, but also by data of their respective sub-items.

More details...

Dynamic List

Two enhancements have been introduced.

1. The multiple cell paste functionality from internal (Scorecard or Table) or external sources for both the category data and the sub-item names, are now also supported in the Dynamic List.
2. The Dynamic List can be configured so that it will not display with its New, Remove and re-ordering controls.

More details...

Scorecard: Configurable Value, Indicator and Reference Columns

The display of the Value, Indicator and Reference values of each category in a scorecard can now be determined by the configurator per category per scorecard and not only per category across all scorecards.

More details...

Form/Dashboard Tab: Read-only status for Category, Cat. (text area) and Dynamic List

The Category and Cat. (text area) and Dynamic List components can be set as Read-only on the tab wizard's component step. This will prevent data entry into the category's Value, Indicator or Annotation fields or the Dynamic List's sub-item names or category cells even for a user who has permission to edit them.

More details...

Table wizard: Enhancement of *Apply to Row/Column* functionality

It is now possible to apply a table cell's *Category* and *Data as of* date across an entire Row or Column in addition to its *Type* and *Background*.

More details...

Category

Two enhancements have been introduced.

1. Scheduled categories are, by default, valid only for the period they are defined and not beyond. This default can be changed per category.
2. User categories can now also be defined by advanced functions.

More details...

P6 Bridge for Project Management

PPM 8 supports the additional functionality of updating PPM items with data from P6 role-based project spreadsheets, and PPM sub-items with data from P6 WBS level spreadsheets.

More details...

Ability to Display and Re-enable Disabled Values in Value Lists

In the value list wizard, it is possible to display the disabled values of a value list, and then to subsequently re-enable them.

More details...

Description

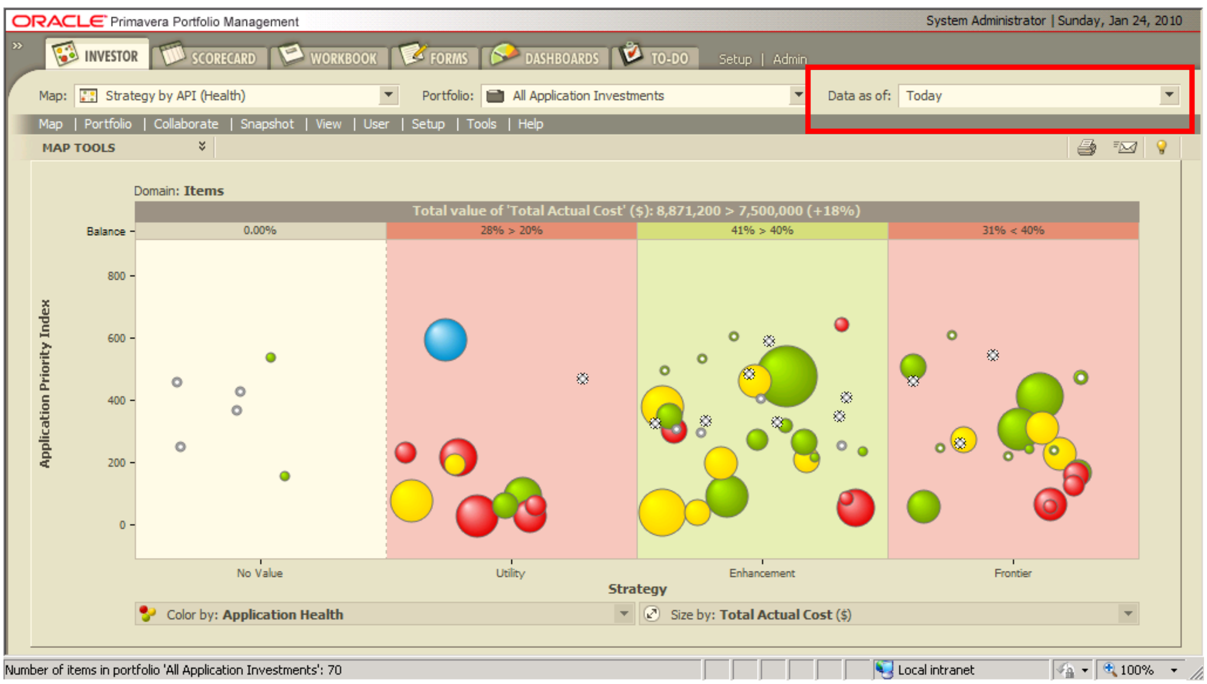
Features

Versioning

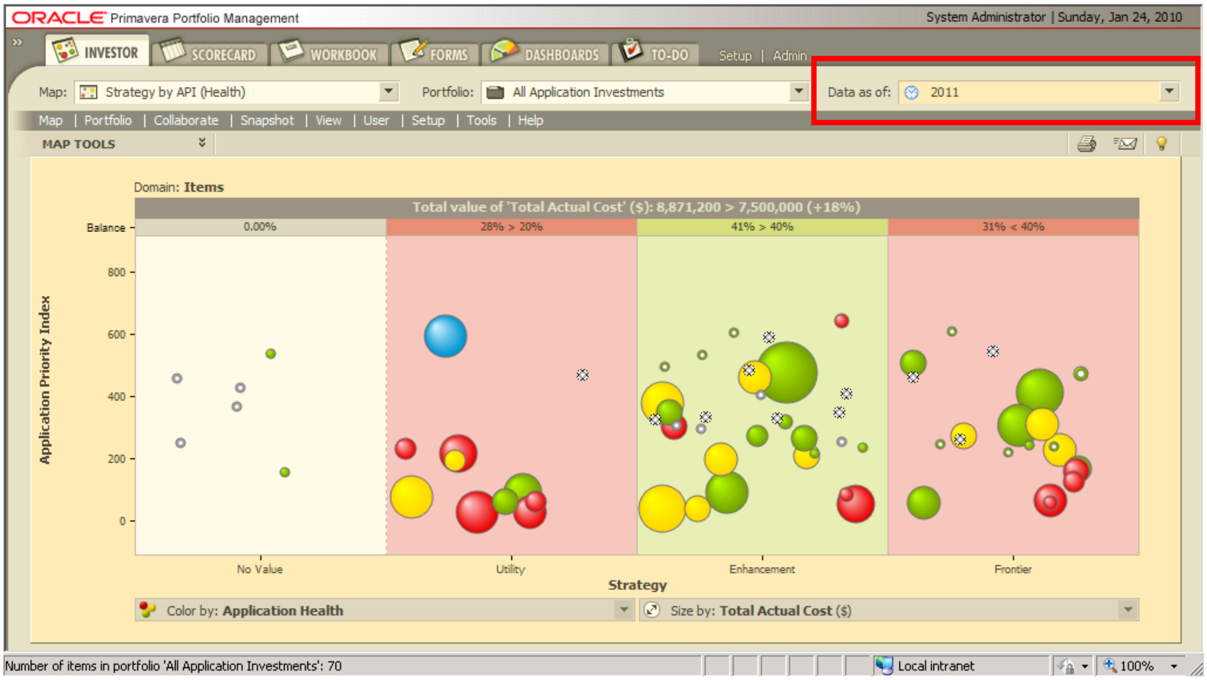
It is now possible to display and input historical and future data in all of the main PPM modules. The end-user can select the date of the data to be displayed, via a new *Data as of* navigation control found at the top-right of the Investor Map, Scorecard, Forms and Dashboards modules. The configurator can determine the date or version of the data to be displayed, by setting the various *Data as of* date controls for the categories in the aforementioned modules. Important and meaningful dates can be saved as Versions for easy re-use when configuring the system.

Investor Map

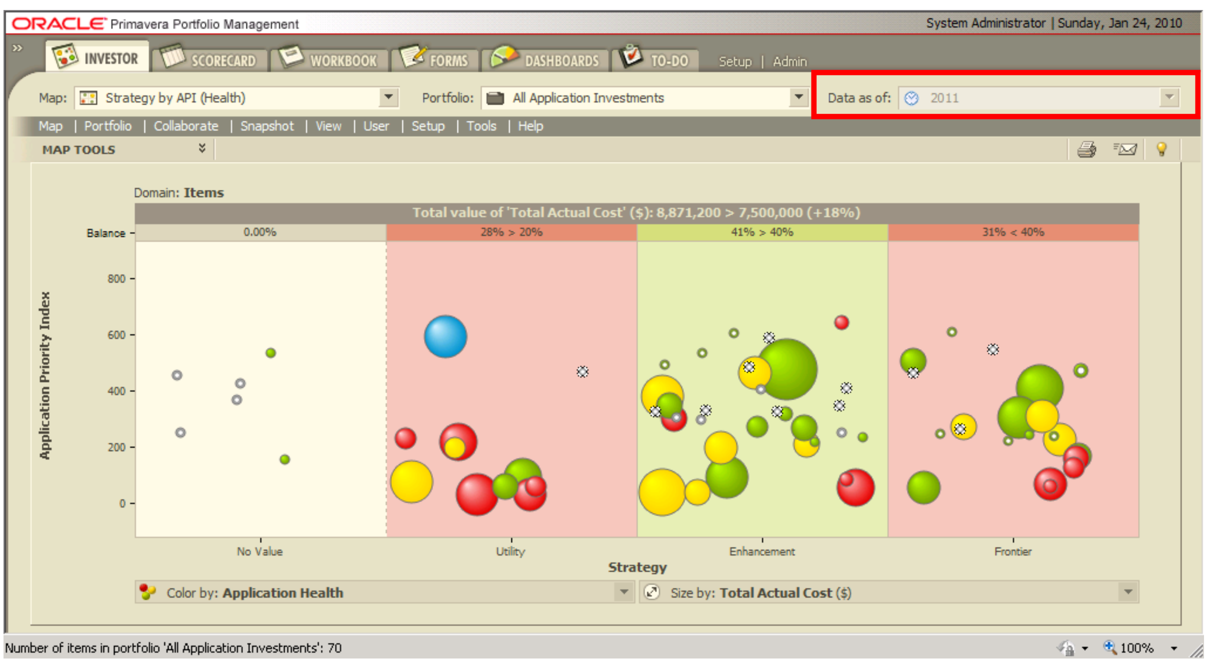
A. Investor Map Module



With the *Data as of* control, the end-user can set the date of the data in the Investor Map provided that the map has not been pre-set to a date or version in the Investor Map wizard. Switching the 'Today' default to any other date or version will automatically color peach both the background of the control and the map.

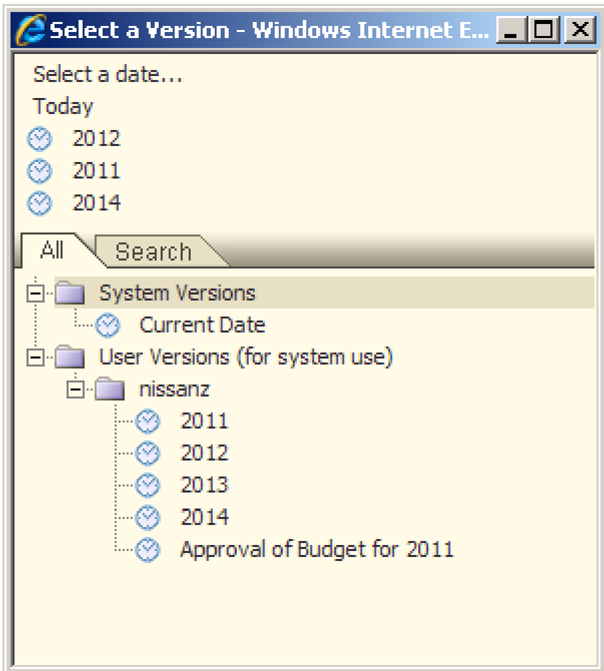


If the map is set a specific date or version in the Map wizard then the control will display that date or version, in gray disabled mode with the end-user not being able to navigate with this control. The map will display the data of all four of its categories according to this date and its background will not be colored peach.

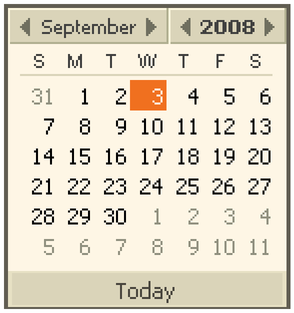


1. 

- Clicking on the *Data as of* control pops up the *Select a Version* pop-up list which supports the following options:

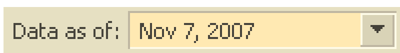


a. 'Select Date...' - which pops up the calendar widget below for selecting an absolute date.



~ Clicking on a date in the calendar will enter it's long version

~ Clicking on Today yields today's calendar date in the long version



b. 'Today', the default date, which is not a version, but a system value (hence no icon preceding it) which displays '*Today's'* value for all Scorecard categories defined in the wizard as <User-Selected>

c. Three most recently used versions (except for the Current Date system version)

d. *All* tab containing the Version hierarchy of folders with their versions. Only those versions for which whose folders the user has view permission will be displayed.

e. Clicking on a version will display the <Version Name> as follows: -

Note: If a configurator defines the *Date as of* field with a version for which the end-user has no view permission, but the end-user does have view permission on this map

~ The end-user will be able to view this map

~ The data as of control will show this version but it will disabled

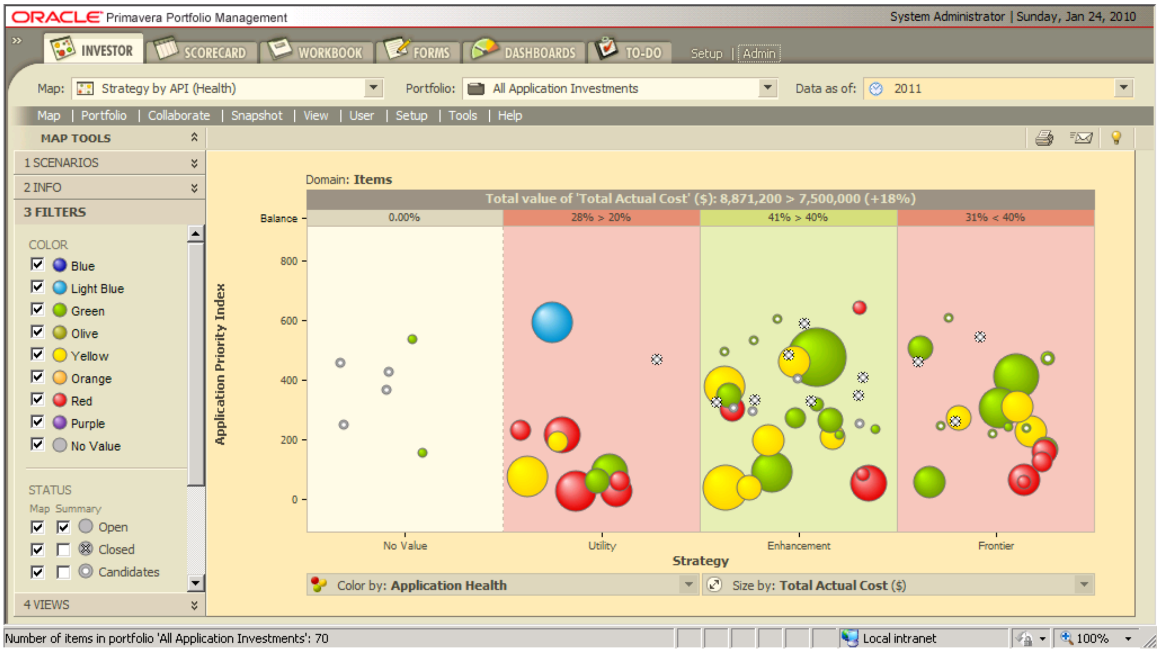
~ This version will not appear in the Version Navigation tree

f. *Search* tab to search for any version in the version hierarchy

g. The date/version selected by the end-user remains until exchanged for some other date and is remembered in the user's cache for the next session.

h. Changing the contents of the *Data as of* control refreshes the screen similar to changing the view or portfolio.

2. The following elements of the Investor Map are affected by changes in the *Data as of* Date/Version:



a. The data of the four map categories

~ *X-axis* - Location of the bubbles/folders on the X-axis

~ *Y-axis* - Location of the bubbles/folders on the Y-axis

~ *Color by* and their alternatives

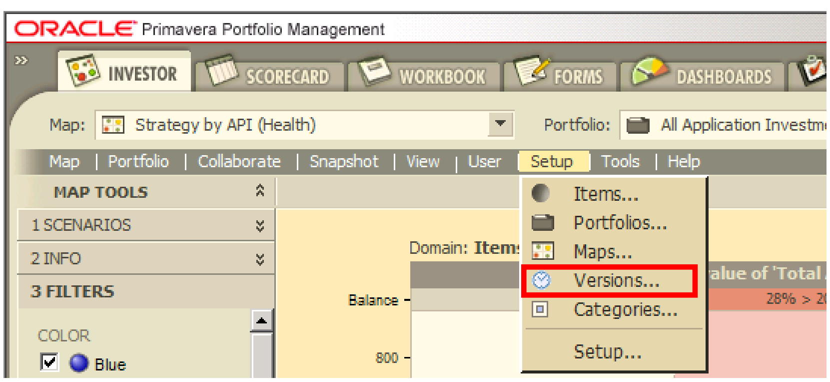
- The color of the bubbles/folders
- Which disabled color filters will appear in the Map Tools (in addition to all of the currently enabled Indicators)

~ *Size by* and their alternatives

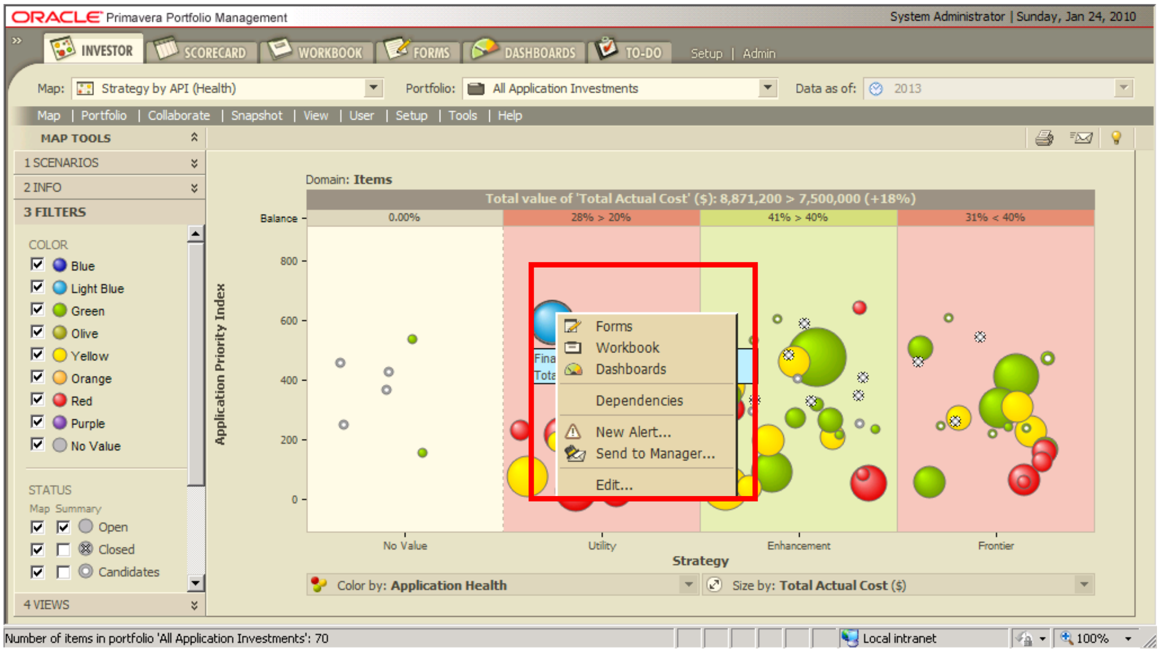
- The size of the bubble/folder
- The Portfolio and Bucket totals
- Min/Max defaults

b. If the end-user selects a *Data as of* Date/Version other than Today, whether by manual navigation of the *Data as of* control or pre-defined via a ProSight link then the map background will be colored peach. This is the case even if the user-selected calendar date or version points to the same data as the default 'Today' does.

3. Setup menu - includes a Versions… option for opening the Setup module with Versions already selected



4. Bubble/Folder right click drill-down menu - The Data as of date/version affects the drill down menu options as follows:



a. Investor map (relevant to the Folder only) – displays the selected portfolio in the map and at the *Data as of* currently displayed

b. Scorecard (relevant to the Folder only) – displays the selected portfolio in the last viewed scorecard at the *Data as of* currently displayed

c. Forms - displays the selected item/portfolio in last viewed form at the *Data as of* currently displayed

d. Workbook – No Change. Displays the selected item/portfolio in the last viewed tab of the Workbook. The temporary scorecard generated from the map's four axes categories will always display current data, since the Workbook does not have a *Data as of* control.

e. Dashboards - displays the selected item/portfolio in an automatic or specifically defined dashboard/tab (as defined in the Map wizard) at the *Data as of* currently displayed. (If no dashboard is selected in the map wizard, the dashboard drill-down option will be disabled accordingly for either Items and/or Portfolios accordingly).

f. Dependencies – displays the selected item/portfolio in either the Workbook/Dependencies tab, or a specific form/tab as defined in the Admin/Defaults tab/General (Dependency) Options

~ If linked to the workbook, No Change.

~ If to a specific form/tab displays the selected item/portfolio in the specific form/tab defined in the General Dependencies Options dialog box (accessed from the Admin/Defaults tab) at the *Data as of* currently displayed.

g. New Alert … – No Change

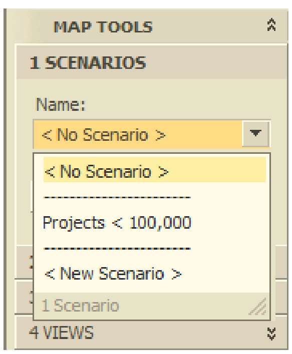
h. Send to Manager … – includes the *Data as of* date/version in the link

i. Edit… - no change

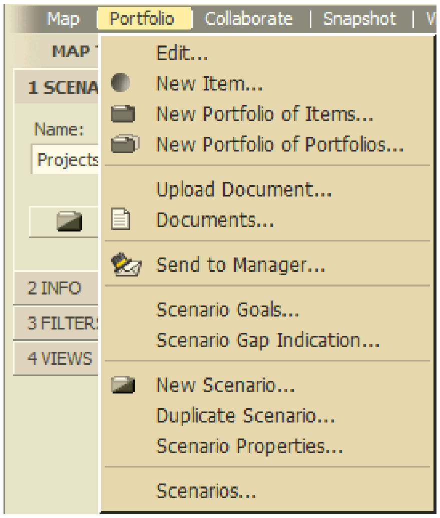
B. Investor Map Scenarios

The investor map has traditionally supported a Portfolio *Version* feature which has nothing to do with *Data as of 'Versioning'.* To remove confusion, the traditional investor map *Version* will be renamed *Scenario* without changing any of its functionality. Follows is a comprehensive list of places where this change has been implemented.

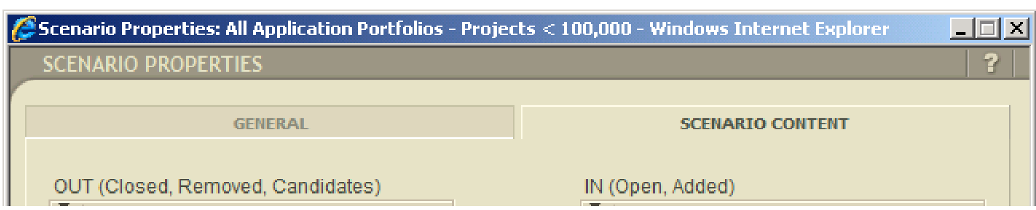
1. Scenario end-user tool and drop-down list



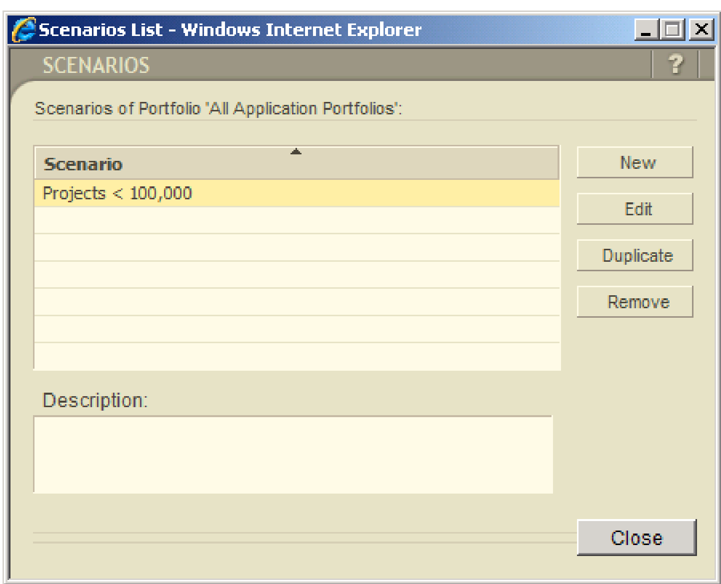
2. Portfolio Menu



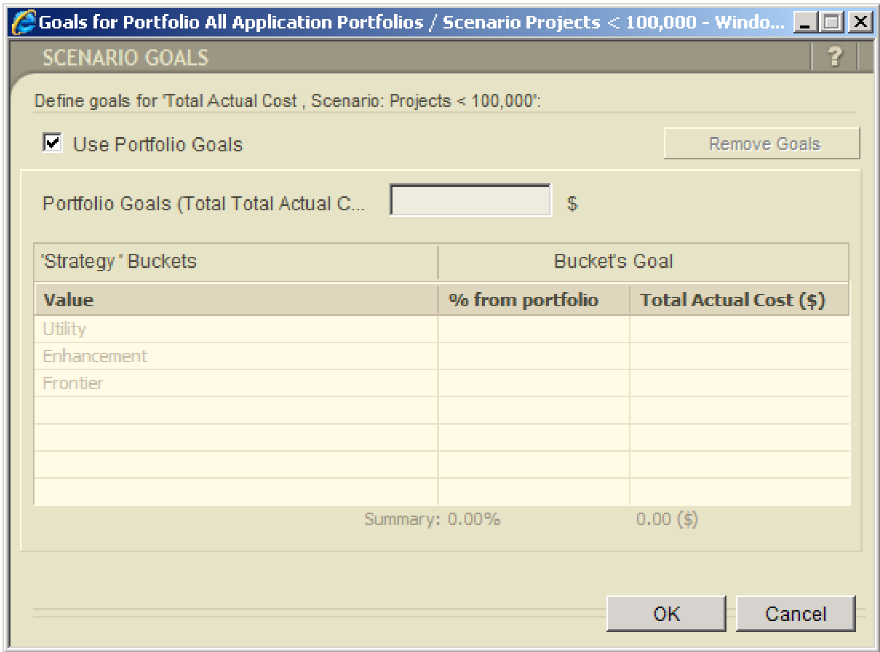
3. Scenario Properties dialog box – 3 places



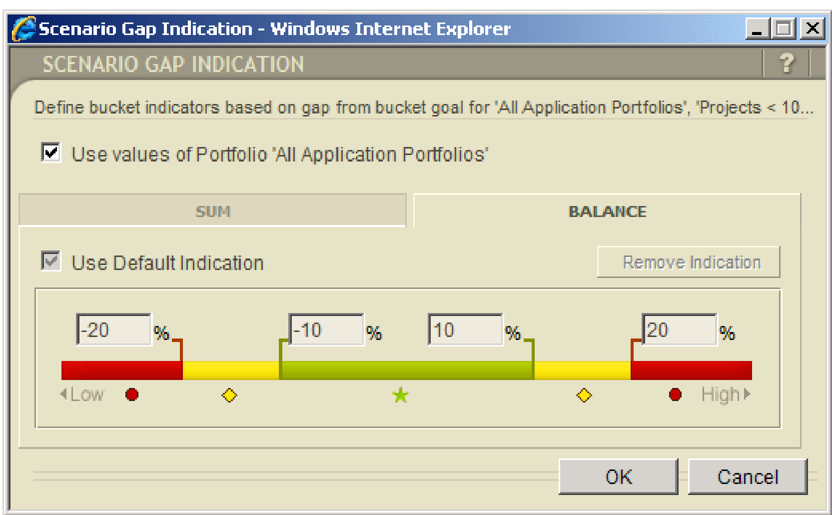
4. Scenarios dialog box



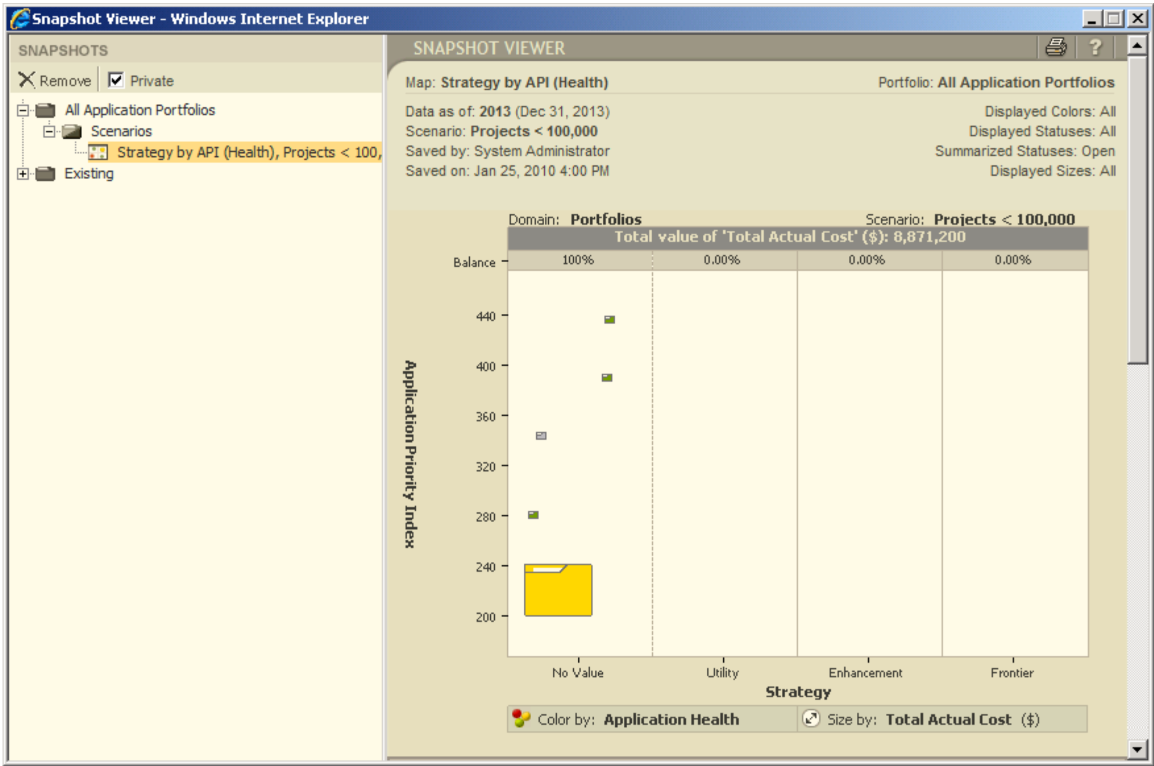
5. Scenario Goals dialog box



6. Scenario Gap Indication dialog box



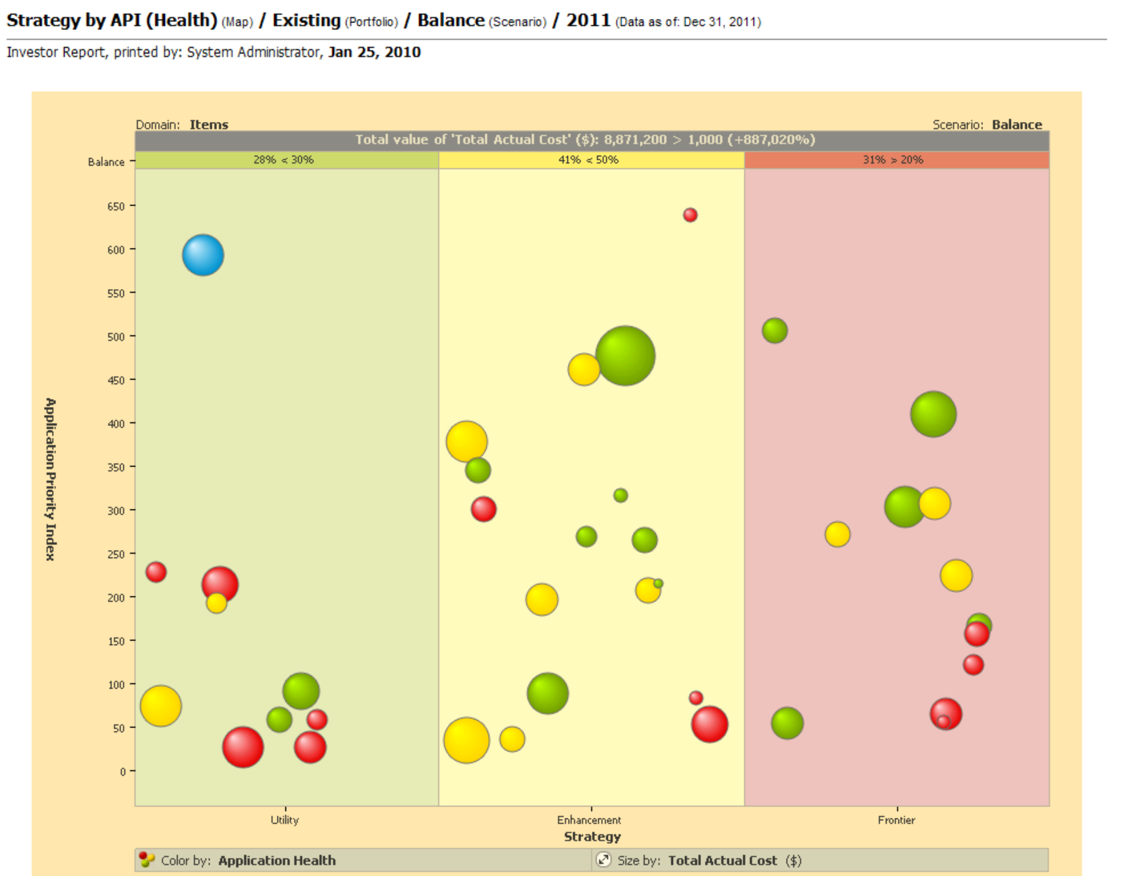
7. Snapshot Viewer



C. Printout, Snapshot & Export

Support of the *Data as of* date in the Investor Map has introduced the following changes in the Printout, Snapshot and Exported files:

1. Printout



a. The 1st line of the map header printout includes add the *Data as of* date as follows: "**<Name_of_Map>** (Map) / **<Name_of_Portfolio>** (Portfolio) / <**Name of Scenario**> (Scenario) <**<Data as of Date/Version>** (Data as of descriptor)" where the *Data as of* part of the header can appear in one of the three following ways

   ~ If *the Data as of* = a date, e.g., Dec 31, 2008 → "**Dec 31, 2008** (Data as of)"

   ~ If the *Data as of* = a Version name, e.g., 'OMB Submission' → "**OMB Submission** (Data as of: Jun 6, 2007)"

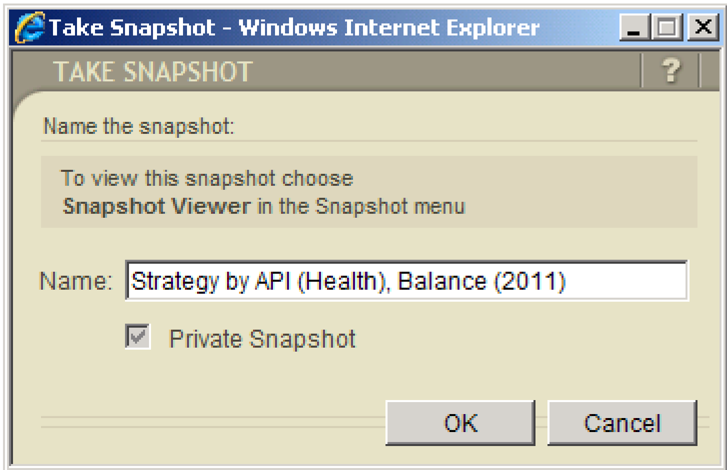
   ~ If the *Data as of* = 'Today' → **Today** (Data as of: Jan 6, 2009)

b. All of the map data (Items/Portfolios, Portfolio totals and bucket totals represents the *Data as of* data and not current data (unless the Data as of = Today).

c. If the map data is user-selected whether via the Data as of control or a My Process link, then the map will be surrounded by a peach-colored background (as in the module).

2. Snapshot

   a. Take Snapshot



The suggested default snapshot name now includes the Data as of value as follows: "<Name of Map>, <Scenario_Name> (<Data as of value>)" where the *Data as of* value could be displayed in one of two ways:

~ As a date, if the *Data as of* value is either Today or a selected date

~ As a version, if the *Data as of* value is a version

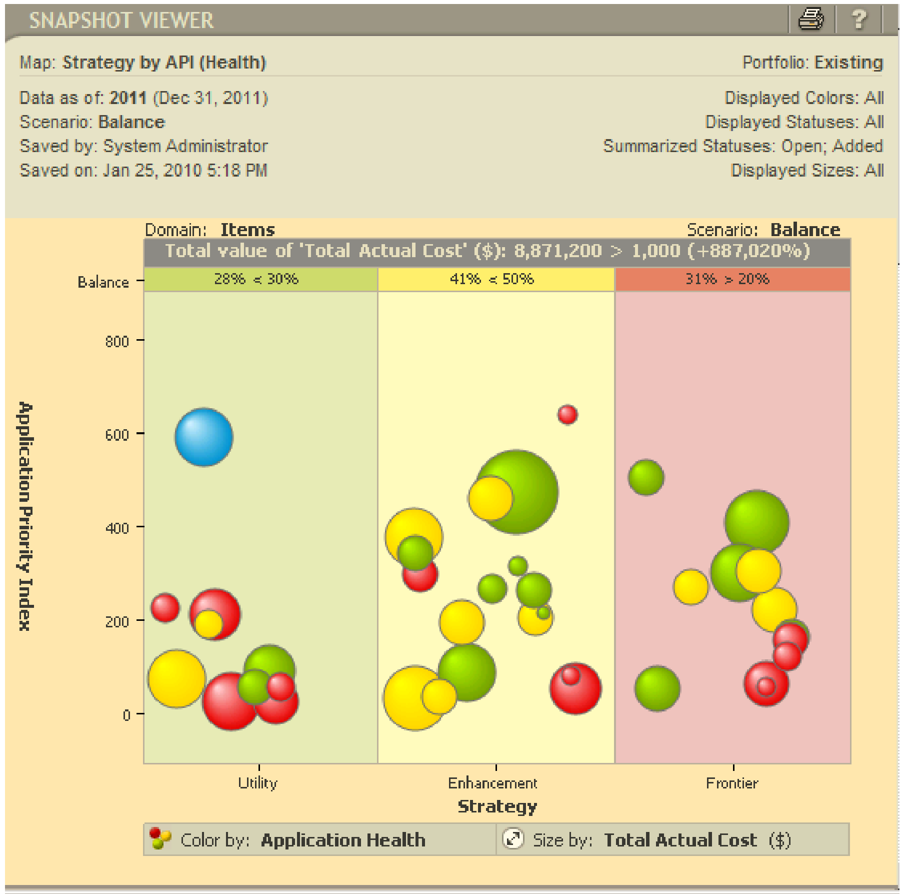
In the example above:

~ Map name = Strategy by API (Health), Risk / Reward

~ Scenario = Balance

~ Data as of = 2011

b. Snapshot Viewer and Print of Snapshot



~ *Data as of* support is added to the top left of the header to the right of the *Data as of* label (the explicit *Data as of* value is in bold). There are three different types of syntax:

- If the *Data as of* value = 'Today', then the *Data as of*: snapshot syntax is '**Today** (<Current_date>)'. e.g., If 'Today' = August 10, 2009 then the *Data as of*: value would be '**Today** (Aug 10, 2009)'

  Note: The *Data as of* date of upgraded snapshots from previous versions will be '**Today** (<Saved on_date>)

- If the *Data as of* value = a version, then the *Data as of*: snapshot syntax is '**<Version_name>** (<Version_Date>)' e.g., If the version name is 'OMB Submission' which translates to June 6, 2007, then the *Data as of*: value would be: '**OMB Submission** (Jun 6, 2007)'

- If the *Data as of* value = a date, then the *Data as of* snapshot syntax is '(**<Selected_date>**)' e.g., If the selected date is Dec 31, 2008, then the *Data as of* value would be: **Dec 31, 2008**

~ All of the map data (Items/Portfolios, Portfolio totals and bucket totals represents the *Data as of* data and not current data (unless the Data as of = Today).

~ If the map data is user-selected whether via the Data as of control or a My Process link, then the map will be surrounded by a peach-colored background (as in the module)

3. Export Map

a. *Data as of* support is added to the right side of the header right-aligned, "Data as of: <**<Data as of Date>/<Version_Name>>** (Data as of descriptor)" – right-aligned where the *Data as of* part of the header can appear in one of the three following ways

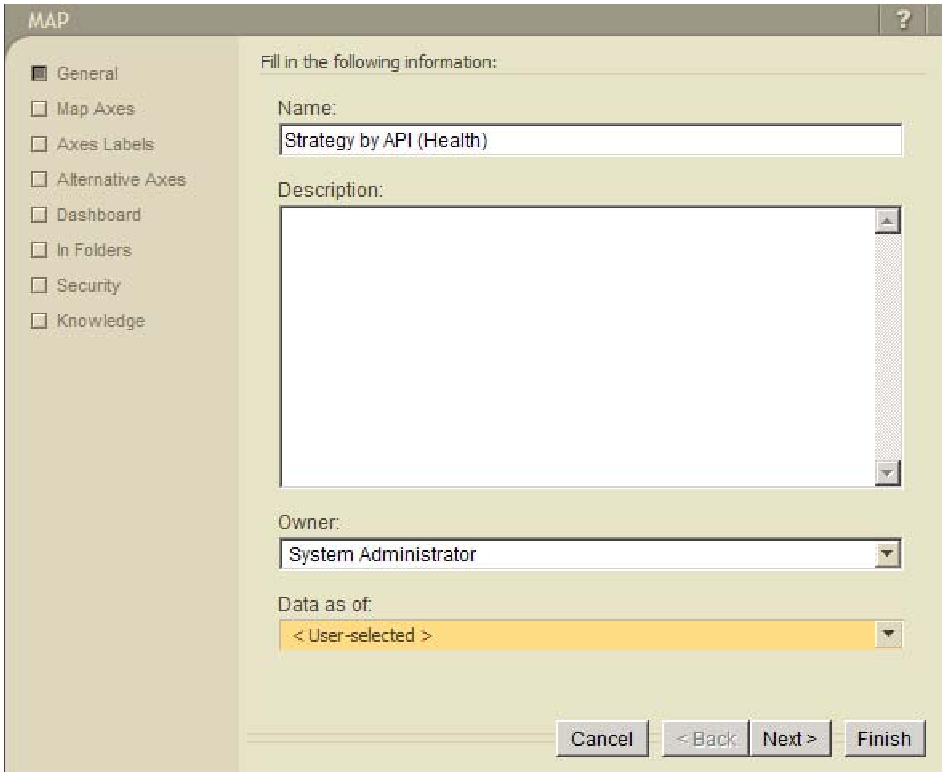
- If the *Data as of* = 'Today', then the *Data as of*: syntax is '**Today** (<Current_date>)'. e.g., If 'Today' = August 10, 2009 then the *Data as of*: value would be '**Today** (Aug 10, 2009)'
- If the *Data as of* = a Version name, then the *Data as of*: syntax is '**<Version_name>** (<Version_Date>)' e.g., If the version name is 'OMB Submission' which translates to June 6, 2007, then the *Data as of*: value would be: '**OMB Submission** (Jun 6, 2007)'
- If the *Data as of* = a date, then the *Data as of*: syntax is '(**<Selected_date>**)' e.g., If the selected date is Dec 31, 2008, then the *Data as of*: value would be: **Dec 31, 2008**

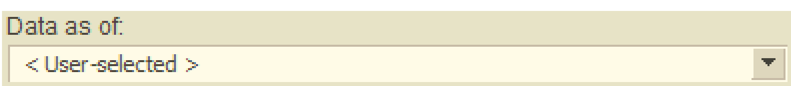
b. All of the map data (Items/Portfolios, Portfolio totals and bucket totals represents the *Data as of* data and not only current data (unless the *Data as of* = Today).

c. When showing a **user-selected** *Data as of* version or date via the Data control or a My Process link, the map background is colored peach:

D. Investor Map Wizard

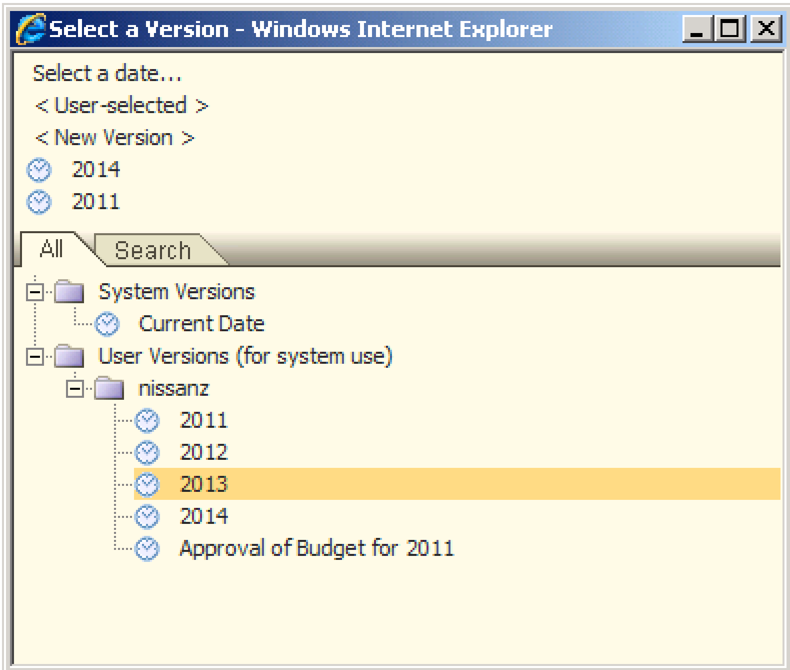
The configurator can pre-set the data of the map to a specific date or version in the *Data as of* field, found on the General step of the Map wizard. A map set to specific date or version cannot be viewed at any other dates or versions. Therefore, the *Data as of* control in the module will display this date in disabled mode.



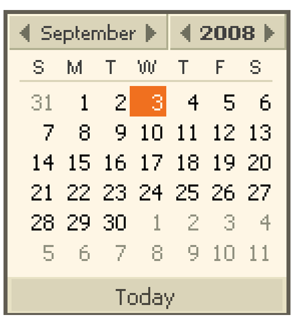


- The *Data as of* field affects the data of all four Map categories: X-axis, Y-axis, Color by and Size by. Clicking on the *Data as of* control pops up the *Select a Version* pop-up list with the following functionality:

Select a Version pop-up list for Configurators



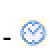
1. 'Select Date...' - which pops up the calendar widget below for selecting an absolute date.



   a. Clicking on a date in the calendar will enter it's long version
   b. Clicking on *Today* yields today's calendar date. **Note:** The bottom button of the widget is Today and not <Current Date> Even though this is the configurator's version of the calendar

2. <User-selected> (the system default) - This means that the data (category or sub-items) will initially display according to '*Today's* value but the user can select a different date via the *Data as of* control in the upper right-hand control of the module

3. '<New Version>' - This accesses the Version wizard at its General step in order to define a new version.

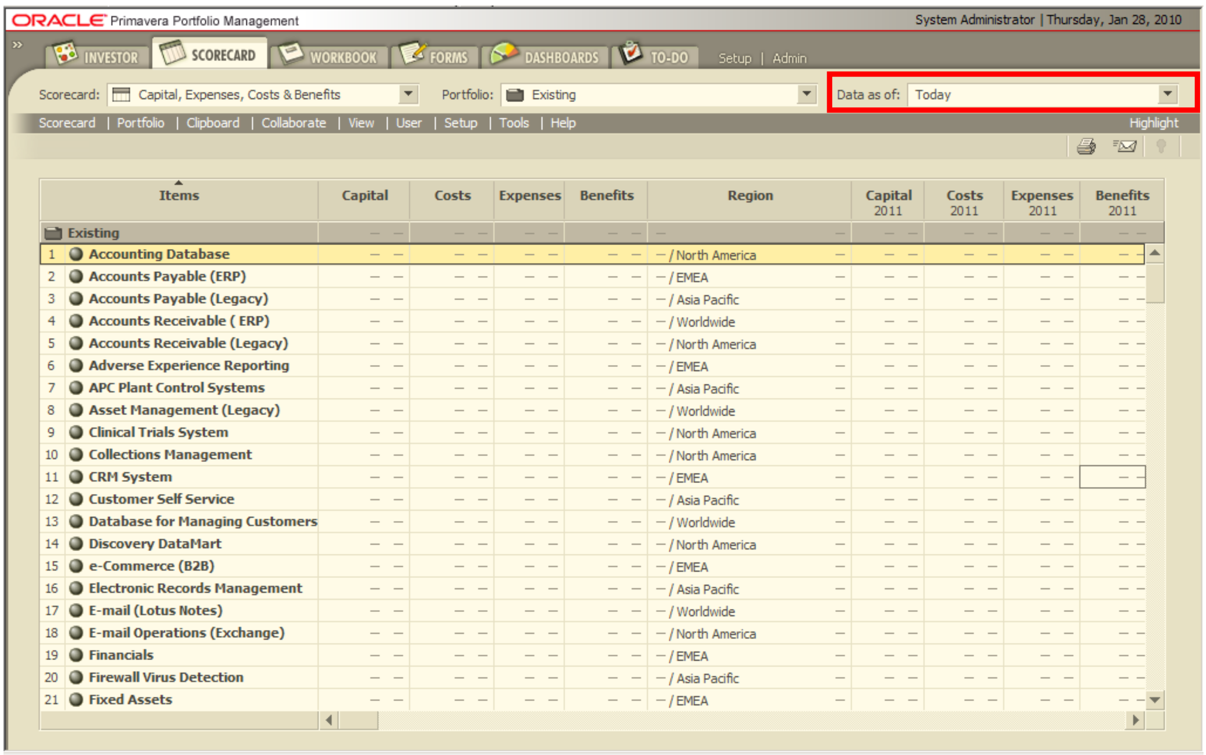
4. 2 most recently used versions, each preceded by the Version icon - 

5. *All* tab containing the Version hierarchy of folders with their versions

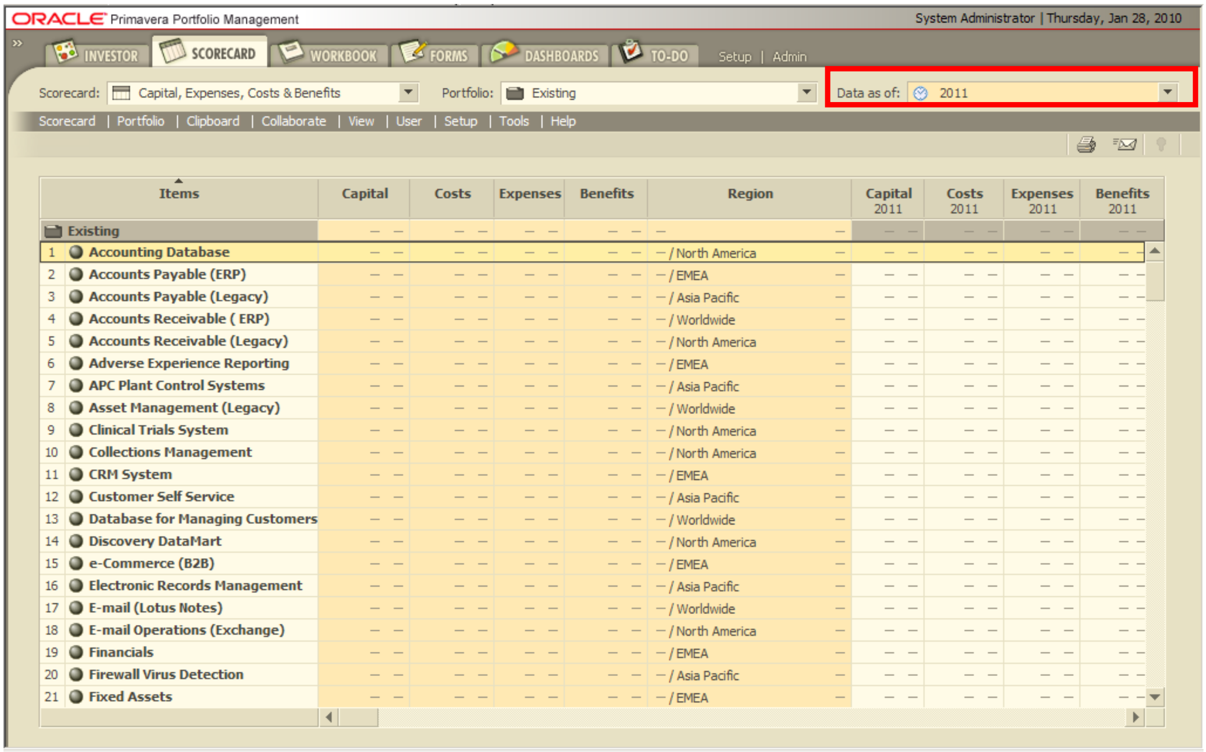
6. *Search* tab to search for any version in the version hierarchy of folders

Scorecard

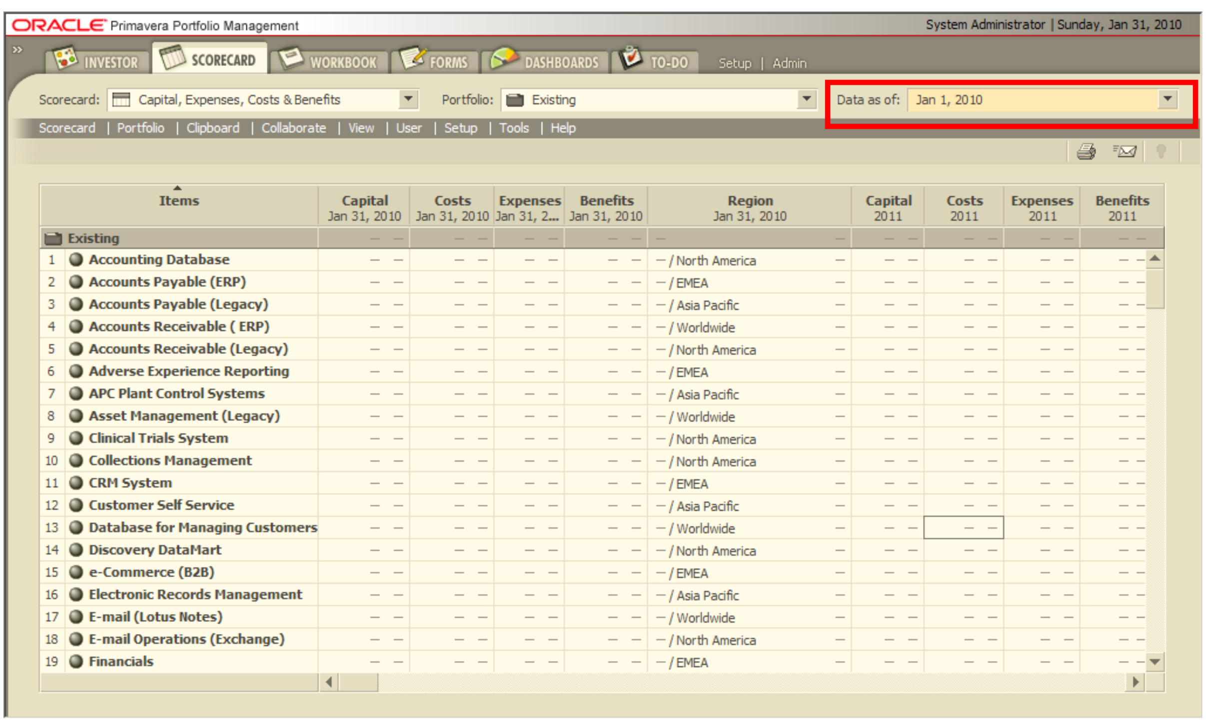
A. Scorecard Module



With the *Data as of* control, the end-user can set the date of the data of any category in the Scorecard (including its value, indicator and reference category) which has not been pre-set to a date or version in the Scorecard wizard. Switching the 'Today' default to any date or version will automatically change the background both of the control and of any cells affected by this switch, to peach color.

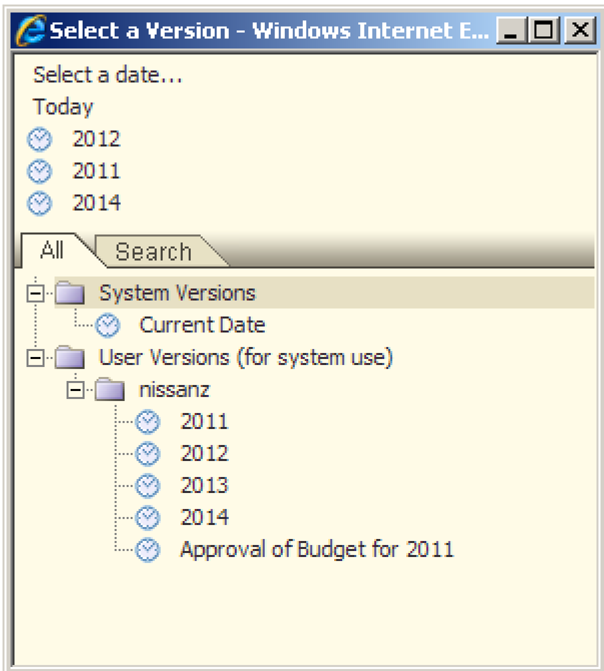


Even if all categories in the Scorecard are pre-set to dates or versions the *Data as of* control is enabled and will change its background color to peach when switched from the 'Today' default, but will not affect the data in any of the categories displayed.

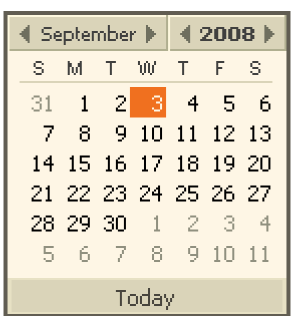


1. 

- The *Data as of* navigation control changes the data accordingly for all scorecard categories (Including Value, Indicator and Reference categories if so defined) whose *Data as of* date in the scorecard wizard was left set to the <User Selected> default. (If there is a hierarchy of filtering categories which filter a value list category these too will be affected by the *Data as of* date in this control.) Clicking on the *Data as of* control pops up the *Select a Version* pop-up list which supports the following options:

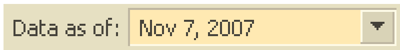


a. 'Select Date...' - which pops up the calendar widget below for selecting an absolute date.



~ Clicking on a date in the calendar will enter it's long version

~ Clicking on Today yields today's calendar date in the long version

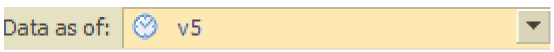


b. 'Today', the default date, which is not a version, but a system value (hence no icon preceding it) which displays '*Today's*' value for all Scorecard categories defined in the wizard as <User-Selected>

c. Three most recently used versions (except for the Current Date system version)

d. *All* tab containing the Version hierarchy of folders with their versions. Only those versions for which whose folders the user has view permission will be displayed.

e. Clicking on a version will display the <Version Name> as follows: -



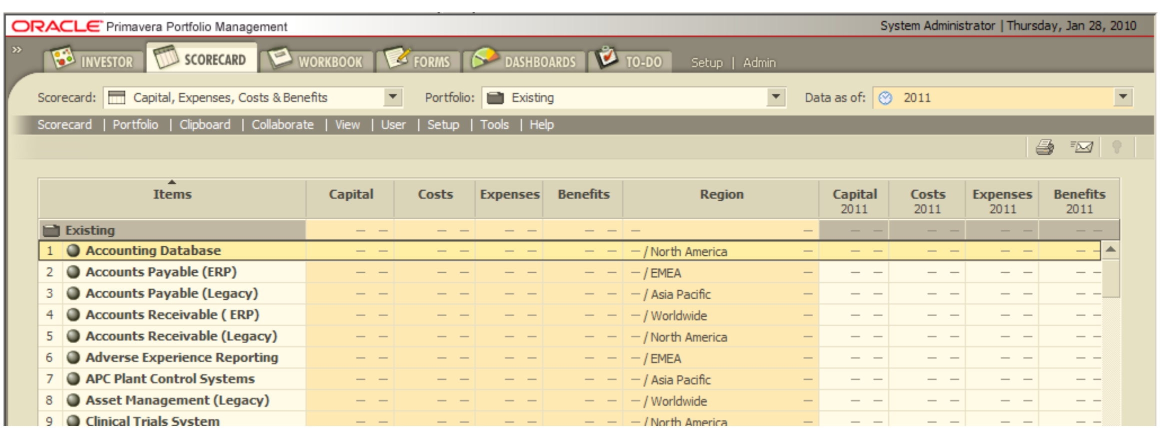
Note: If a configurator defines the *Date as of* field of any category with a version for which the end-user has no view permission, but the end-user does have view permission on this scorecard, then the end-user will be able to view this category in the context of the scorecard even thought this version will not appear in the Version Navigation tree

f. *Search* tab to search for any version in the version hierarchy

g. The date/version selected by the end-user remains until exchanged for some other date and is remembered in the user's cache for the next session.

h. Changing the contents of the *Data as of* control refreshes the screen similar to changing the view or portfolio.

2. The Scorecard is affected by changes in the *Data as of* Date/Version as follows:



a. The background of all non-summary and summary category cells whose *Data as of* date is <User Selected> is colored peach.

~ This is the case even if the user-selected calendar date or version points to the same data as the default ‘Today’ does.

b. Cursor support when switching the *Data as of* control from ‘Today’ to a specific date or version

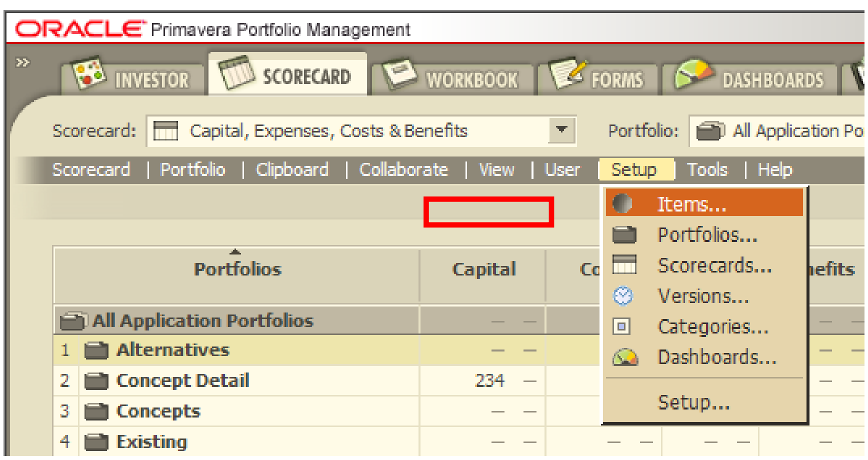
~ When hovering over an enabled cell, the cursor changes from an arrow to a pointer with a clock ( ).

~ When hovering over a disabled cell, the cursor changes from a shaded pointer with a Read-only (No-entry) sign to a shaded pointer with a clock ( ).

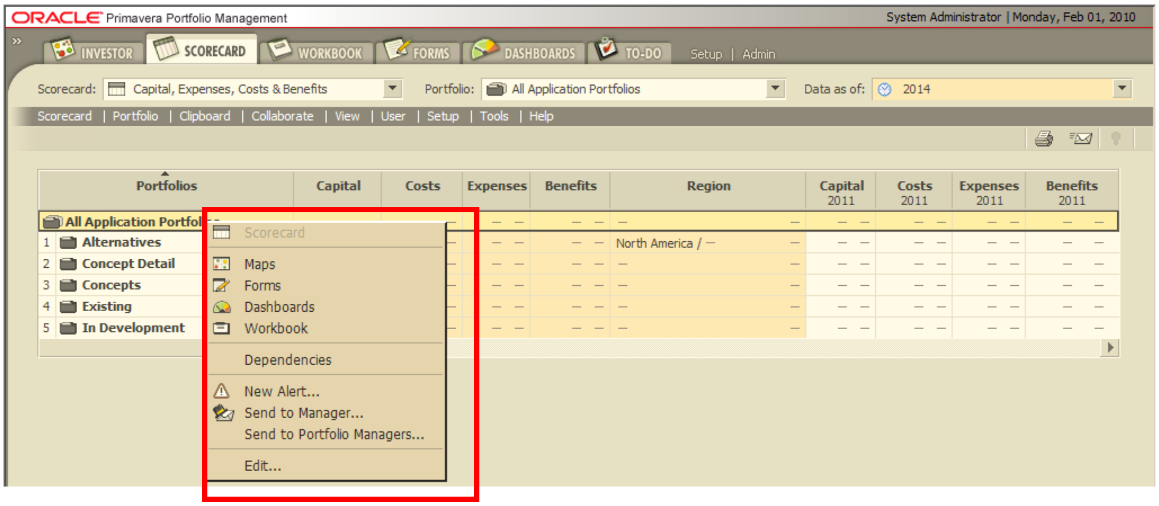
c. Category Validation of user input

Category Validation, which applies to the Values of categories whose value type is either integer, float, text or date, will continue to validate the input into category values of the scorecard whether they display the default current value of the Category (<User-selected>) or any other date or version of the category, whether set by the configurator in the scorecard wizards or by the end-user via the *Data as of* control:

3. Setup menu - includes a Versions… option for opening the Setup module with Versions already selected



4. Portfolio/Item right click drill-down menu - The Data as of date/version affects the drill down menu options as follows:



a. Investor map (relevant to Portfolios only) – displays the selected portfolio in the last viewed map at the *Data as of* currently displayed.

b. Scorecard (relevant to Portfolios which are not the top level Portfolio) – displays the selected portfolio in the scorecard and at the *Data as of* currently displayed.

c. Forms - displays the selected item/portfolio in last viewed form at the *Data as of* currently displayed.

d. Dashboards - displays the selected item/portfolio in last viewed form at the *Data as of* currently displayed.

e. Workbook – No Change. Displays the selected item/portfolio in the last viewed tab of the Workbook. The scorecard of the workbook will always display current data, since the Workbook does not have a *Data as of* control.

f. Dependencies – displays the selected item/portfolio in either the Workbook/Dependencies tab, or a specific form/tab as defined in the Admin/Defaults tab/General (Dependency) Options

~ If linked to the workbook, No Change.

~ If to a specific form/tab displays the selected item/portfolio in the specific form/tab defined in the General Dependencies Options dialog box (accessed from the Admin/Defaults tab) at the *Data as of* currently displayed.

g. New Alert … – no change

h. Send to Manager … – includes the *Data as of* date/version in the link

i. Send to Portfolio Managers … (relevant to the top-level Portfolio only) - includes the *Data as of* date/version in the link

j. Edit… - no change

5. Category drill down - Dashboards

Categories set to display Automatic dashboards, will display these dashboards according to the *Data as of* date set for this category by the Configurator, or that set by the end user via the *Data as of* control if the category *Data as of* was set to <User-selected>.

6. Export

   a. The data exported for categories with no pre-set *Data as of* date/version reflects the date/version currently selected in the *Data as of* control. The data exported for those categories with a pre-set date/version will continue to reflect that pre-set date/version.

   b. The suggested default file name is concatenated from the 'scorecard name', 'portfolio name' and 'Data as of control content' as follows: "<Scorecard_Name>-<Portfolio Name>_<Date>/<Version Name>: <Calculated date of Version>_<(User) if user-selected>.

      ~ This concatenated name is limited to 100 characters including the ".csv" file extension.

7. Print

Capital, Expenses, Costs & Benefits (Scorecard) **/ All Projects** (Portfolio) **/ 2011** (Data as of: Dec 31, 2011)

Scorecard Report, printed by: System Administrator, **Feb 02, 2010**

		Items	Capital	Costs	Expense	Benefits	Region		Capital 2011	Costs 2011	Expenses 2011	Benefits 2011
		All Projects	55,000	27,500	110,000	320,000	Worldwide / Worldwide		55,000	27,500	110,000	320,000
1		**Project-01**	1,000	500	20,000	40,000	North America / North America	—	1,000	500	20,000	40,000
2		**Project-02**	2,000	1,000	18,000	36,000	EMEA / North America	—	2,000	1,000	18,000	36,000
3		**Project-03**	3,000	1,500	16,000	32,000	Asia Pacific / North America	—	3,000	1,500	16,000	32,000
4		**Project-04**	4,000	2,000	14,000	28,000	Worldwide / North America	—	4,000	2,000	14,000	28,000
5		**Project-05**	5,000	2,500	12,000	24,000	North America / EMEA	—	5,000	2,500	12,000	24,000
6		**Project-06**	6,000	3,000	10,000	24,000	North America / EMEA	—	6,000	3,000	10,000	24,000
7		**Project-07**	7,000	3,500	8,000	28,000	North America / EMEA	—	7,000	3,500	8,000	28,000
8		**Project-08**	8,000	4,000	6,000	32,000	EMEA / Asia Pacific	—	8,000	4,000	6,000	32,000
9		**Project-09**	9,000	4,500	4,000	36,000	EMEA / Asia Pacific	—	9,000	4,500	4,000	36,000
10		**Project-10**	10,000	5,000	2,000	40,000	Asia Pacific / Asia Pacific	—	10,000	5,000	2,000	40,000

   a. The data printed for any categories with no pre-set *Data as of* date/version reflects the date/version currently selected in the *Data as of* control. The data exported for those categories with a pre-set date/version will continue to reflect that pre-set date/version.

b. User-selected data is printed on a peach-colored background (as in module) or gray-tone equivalent

c. The 1st line of the scorecard header will read as follows: "**Name of Scorecard** (Scorecard) / **Name of Portfolio** (Portfolio) / **Date** (Data as of)/**Version Name**: (Data as of <Calculated date of Version>)"

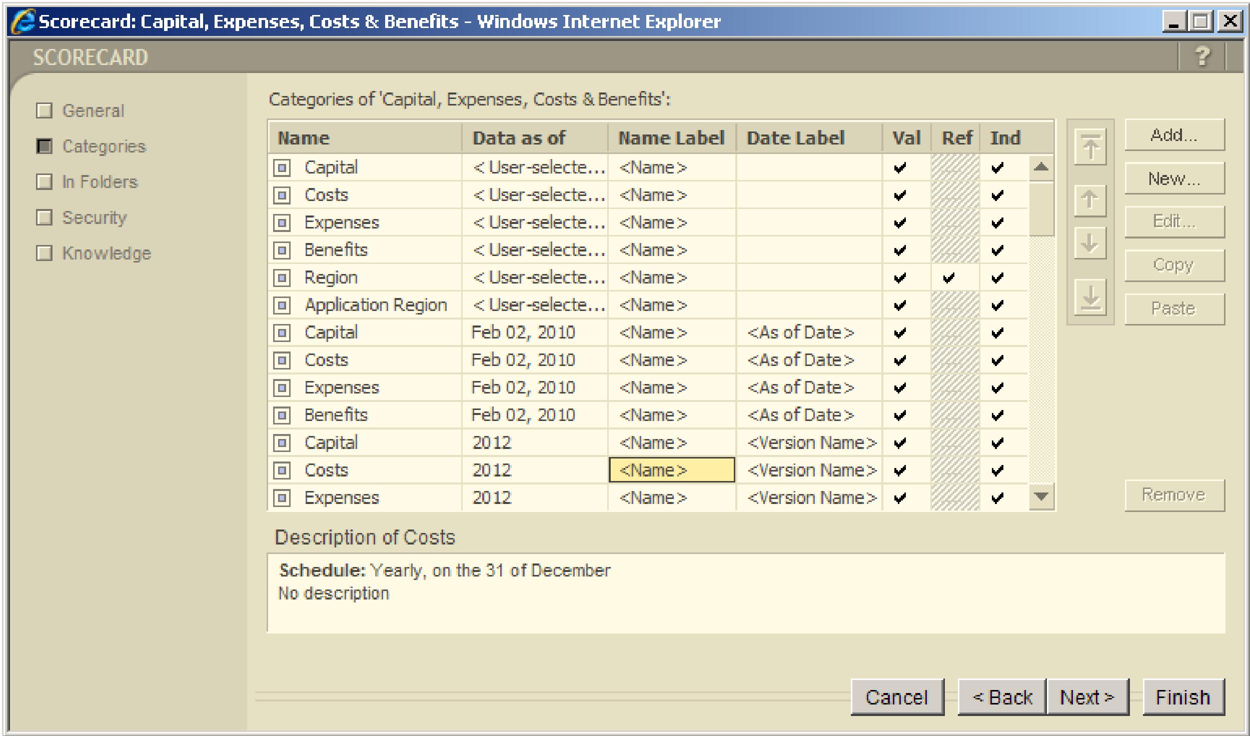
   ~ If the *Data as of* = 'Today' the last part of the printout header will read: **Today** (Data as of: Jan 6, 2009)

   ~ If the *Data as of* = a Version, e.g., 'OMB Submission', the last part of the printout header will read: **OMB Submission** (Data as of: Jun 6, 2007)

   ~ If *the Data as of* = a date, e.g., Dec 11, 2008, then the last part of the Printout Header should read: **Dec 11, 2008** (Data as of)

B. Scorecard Wizard - Categories step

The configurator can pre-set the data of any category in the scorecard not only to to a specific calendar date but also to a pre-defined version via the *Data as of* column in the Categories step of the Scorecard wizard. If the *Data as of* is left at its default <User-selected> value, then the *Data as of* date or version displayed or entered is controlled by the end-user via the *Data as of* control in the module.



Data as of
Oct 2, 2008
OMB Submission
<User-selected>

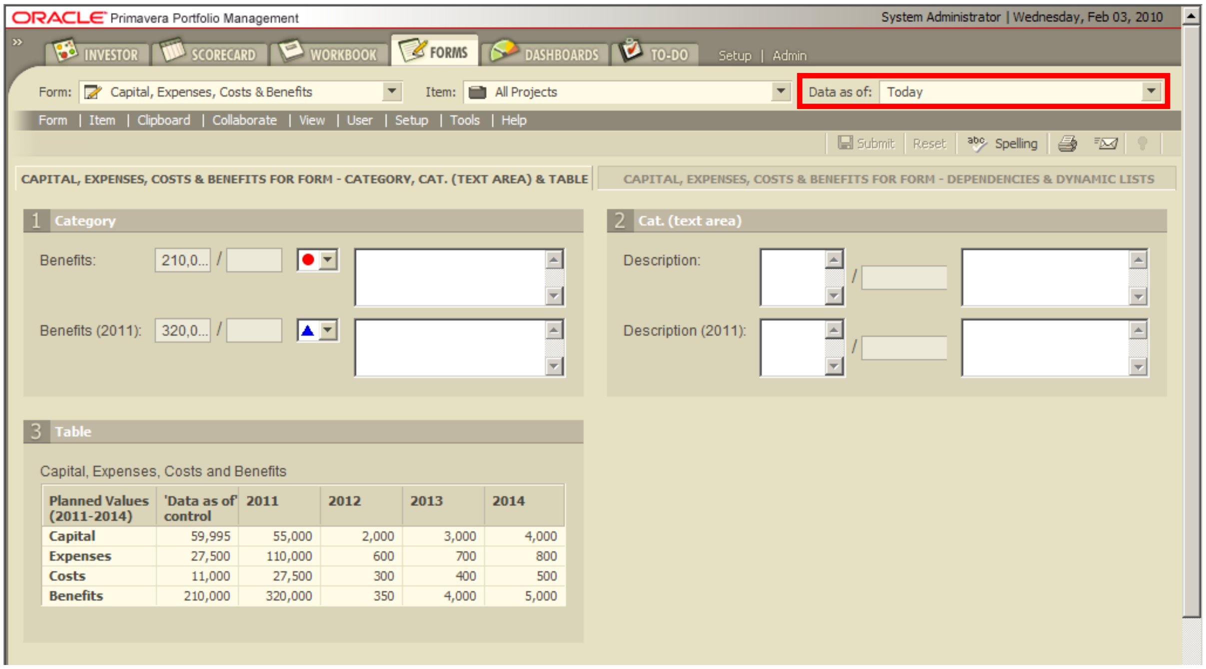
1. - *Data as of* column – by default the content of each cell is <User-selected>. This means that the cell will display '*Today's*' value of the category (Value, Indicator and Reference) but the user can select a different *Data as of* date via the *Data as of* control in the upper right-hand control of the module. Clicking on a *Data as of* cell pops up the Select a Version pop-up list. See the Select A Version pop-up list For Configurators for a detailed explanation of its functionality:

Data as of	Name Label	Date Label
< User-selecte...	<Name>	
Feb 02, 2010	<Name>	<As of Date>
2011	<Name>	<Version Name>

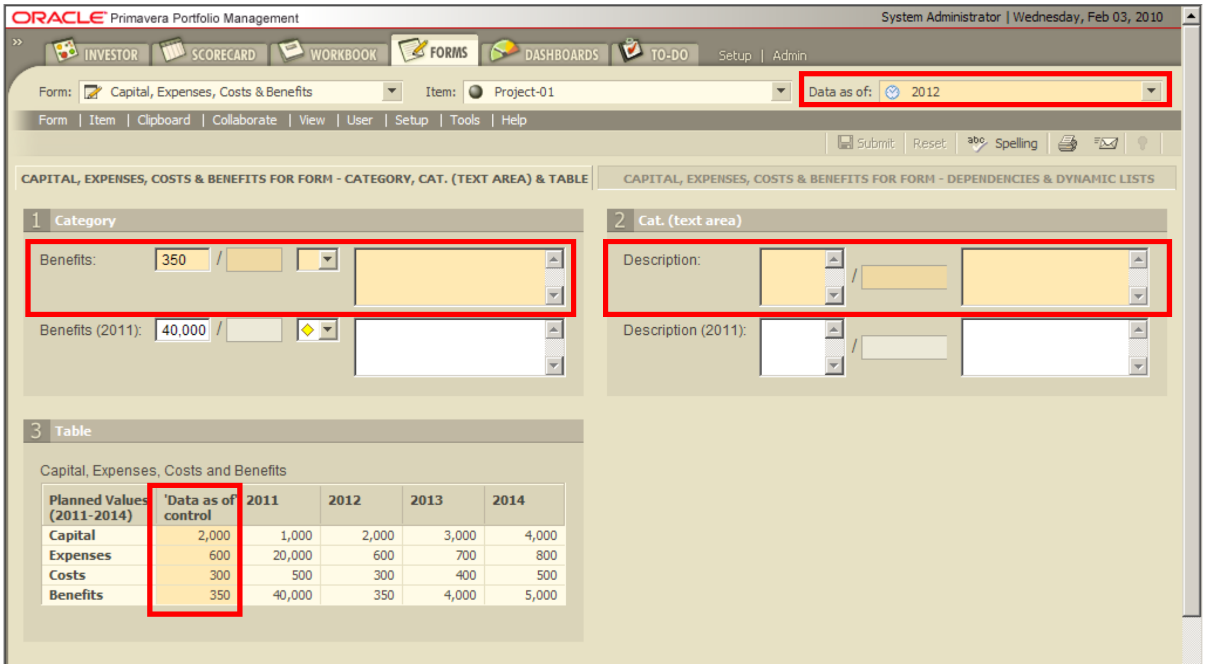
2. - *Date Label* column
   a. Cell defaults:
      ~ If the *Data as of* = '<User-selected>' then Date Label is left blank
      ~ If the *Data as of* is a Calendar Date then Date Label = '<As of Date>'
      ~ If the *Data as of* is a version then Date Label = '<Version Name>'

Form/Dashboard

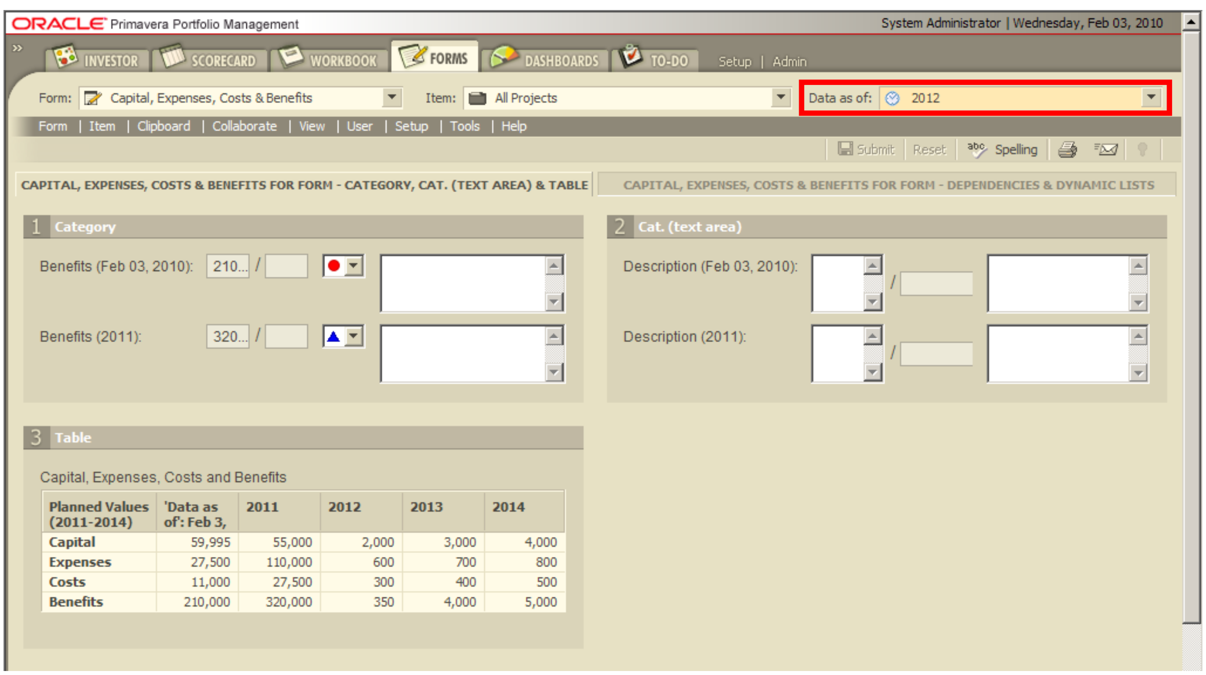
A. Form/Dashboard Module



With the *Data as of* control, the end-user can set the date accordingly for the Category Values, Indicators, Annotations and Reference Categories for all Form/Dashboard Categories, Cat. (text area)'s, Graphs, Tables, Dependencies Lists and Dynamic Lists whose *Data as of* date have not been pre-set to a date or version in their respective wizards. Switching the 'Today' default to any other date or version will automatically color peach both the background of the control and the background of the affected fields or graphs.



Even if all *Data as of* fields in the Tab wizard or other wizards used by the Tab components are pre-set to dates or versions, the *Data as of* control is enabled and will change its background color to peach when switched from the 'Today' default, but will not affect the data in any of these displayed components.

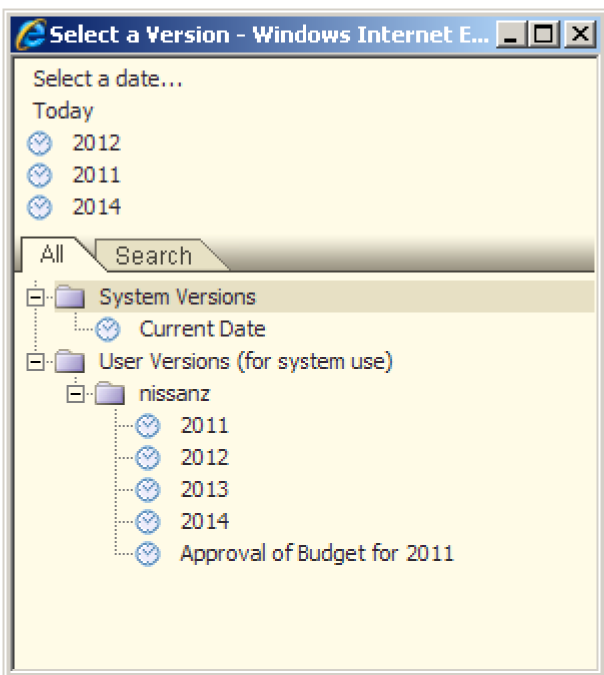


1. 

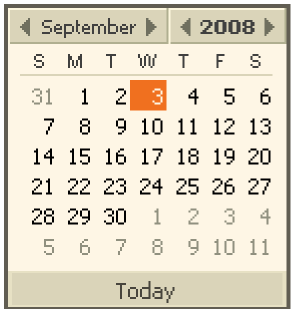
- The *Data as of* navigation control changes the data for the Category Values, Indicators, Annotations and Reference Categories for the following Form/Dashboard tab components:

   a. Category
   b. Cat. (text area)
   c. Graphs
   d. Tables
   e. Dependencies List
   f. Dynamic List (both the categories and the Sub-item name)

This is provided that their *as of* date has not been pre-set to a date or version in their respective wizards. (If there is a hierarchy of filtering categories which filter a value list category these too will be affected by the *Data as of* date in this control.) Clicking on the *Data as of* control pops up the *Select a Version* pop-up list which supports the following options:

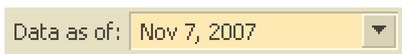


a. 'Select Date...' - which pops up the calendar widget below for selecting an absolute date.



~ Clicking on a date in the calendar will enter it's long version

~ Clicking on Today yields today's calendar date in the long version



b. 'Today', the default date, which is not a version, but a system value (hence no icon preceding it) which displays '*Today's'* value for all Scorecard categories defined in the wizard as <User-Selected>

c. Three most recently used versions (except for the Current Date system version)

d. *All* tab containing the Version hierarchy of folders with their versions. Only those versions for which whose folders the user has view permission will be displayed.

e. Clicking on a version will display the <Version Name> as follows: -

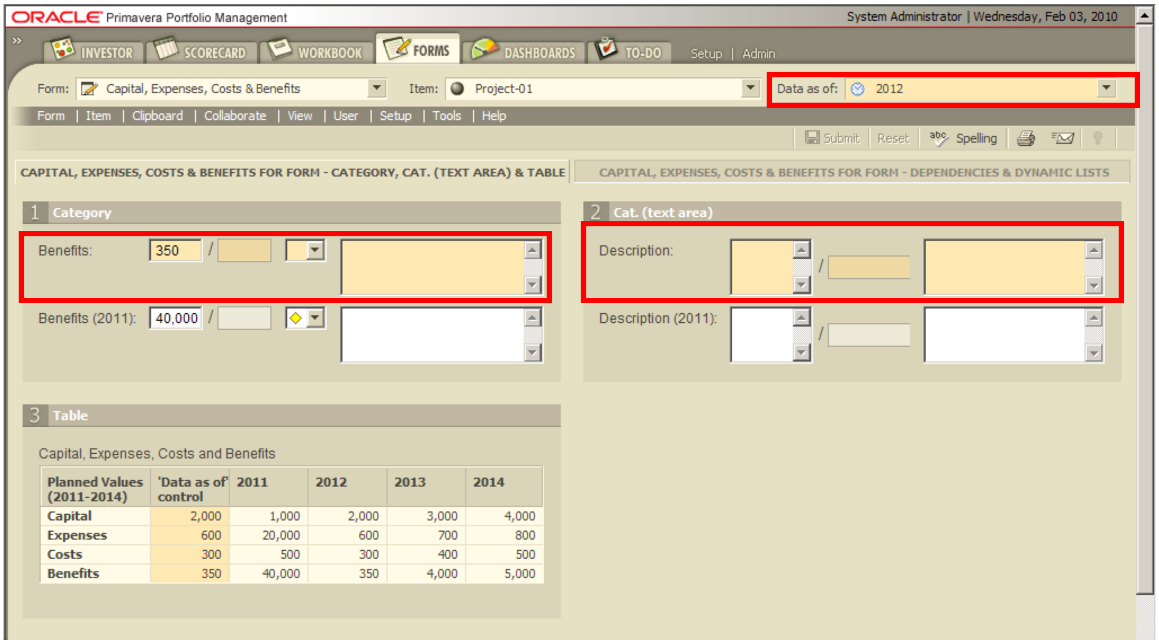
Note: If a configurator uses a version for which the end-user has no view permission to define any of the *as of* dates in any of the aforementioned tab components, the end-user cannot see this version in the version hierarchy in the *Data as of* control. Nevertheless, if the end-user has view permission on the tab and the Form/Dashboard in which it is contained, he will be able to view this version in the context of its Form/Dashboard.

f. *Search* tab to search for any version in the version hierarchy

g. The date/version selected by the end-user remains until exchanged for some other date and is remembered in the user's cache for the next session.

h. Changing the contents of the *Data as of* control refreshes the screen similar to changing the view or portfolio.

2. The following components of the Form/Dashboard are affected by changes in the *Data as of* Date/Version:

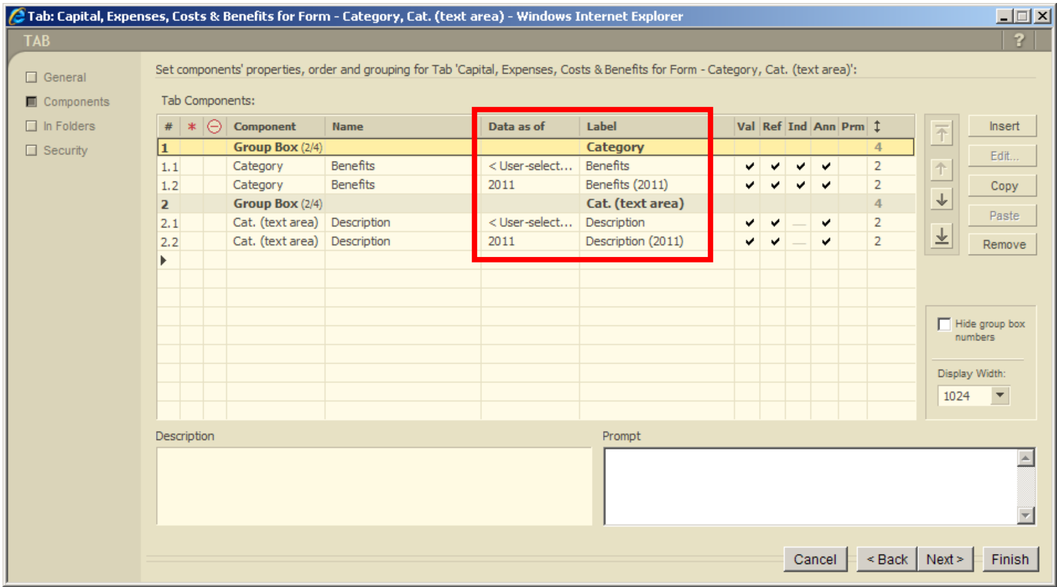


a. Category and Cat. (text area)

The *Data as of* date of each Category or Cat. (text area) component cell can be set either per component in the Components step of the Tab wizard or by the end-user via the *Data as of* control in the Form/Dashboard module. This date will affect the Value, Indicator, Reference value and Annotation related to this category.

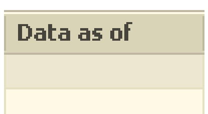
Note: If the component is a category whose *Value type* is a *Value List* which is *Filtered by* another category, then the filtering category is also set to the data point defined in the tab wizard. (If there is a hierarchy of filtering categories which filter this category these too will be set by the *Data as of* date for this category).

~ Pre-configuring a Category or Cat (text area) with a *Data as of* date/version

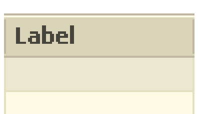


- After selecting the Category or Cat. (text area) component in the **Component** column, select a category in the corresponding **Name** cell.

  Note: The **Component** column precedes the **Name** column.

- 

 - The date or version of the selected category data is determined by the new *Data as of* field, located between the *Name* and *Label* columns. It affects the Value, Reference category, Indicator and Annotation of the selected category. Clicking on a *Data as of* cell pops up the Select a Version pop-up list. For a detailed description of its functionality see the **Select a Version pop-up list for Configurators**.

- 

 - the Label field can be used to indicate the *Data as of* date or version in addition to the Name of the category. The label default reflects the different kinds of *Data as of* values as follows:

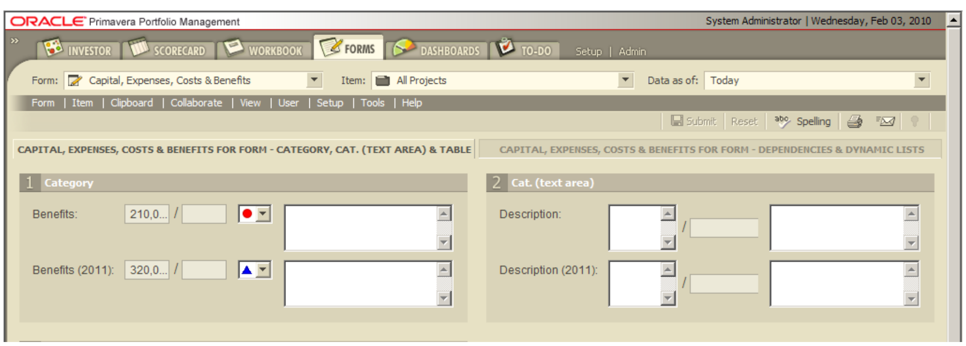
  - If *Data as of* = '<User Selected>' then the *Label* = *Name*
  - If Data as of = any Date then the *Label* = *Name* + (Date)

- If *Data as of* = Version then the *Label = Name* + (Version name)

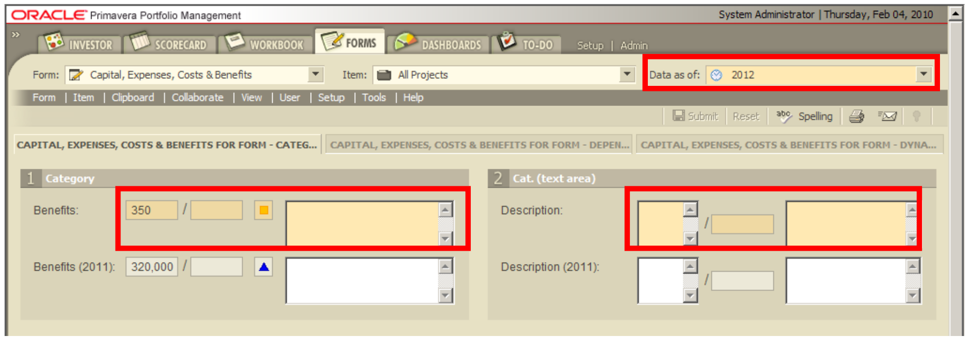
Note: If the *Label* field has not been manually defined or erased then it changes dynamically when the *Name* or *Data as of* fields are changed. Once the label has been manually changed, updates to the *Name* or *Data as of* fields are no longer automatically reflected in the label.

~ Evaluation of the Category's or Cat. (text area)'s *Data as of* date/version in the Form/Dashboard module

- If the *Data as of* date of a Category or Cat. (text area) component has been set to a specific date or version, then the data displayed or input will be according to the date/version set on the tab, and not according to the date/version set by the end-user via the *Data as of* control.
  - The actual *Data as of* date/version can be displayed on the tab via the Category label, which by default is 'Name of Category (Date/Version)', i.e., Budget (2011)
- If the *Data as of* date of a **Category** or **Cat. (text area)** component is left at its default *<User-selected>*, then the data displayed or input will be according to the date/version set by the end-user via the *Data as of* control.
  - If the *Data as of* control = 'Today' (the default) the category data displayed is <Current> with the normal background color, light when enabled and dark when disabled.

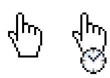


- If the *Data as of* control = a date or version (even if the date or version is equal to today's date), then the background of the data field will be colored as follows:



➢ If the field is enabled, it will be colored peach (the same color as that of the background of the *Data as of* control). The cursor will change from its standard form to its *Data as of* form which adds a clock face to the cursor, as follows:

 - when hovering over the field

 - when selecting values or indicators from a list

 - when entering text into a field

➢ If the field is disabled, it will be colored dark peach. The cursor will change from its standard darkened arrow form to its *Data as of* form which adds a clock face to the cursor - 

Note: If the field is enabled when the *Data as of* control equals 'Today' but is disabled when the *Data as of* control is set to a past date (e.g., when the end-user has permission to edit current data but not past data) then when *Data as of* = 'Today' the field will be colored white, while when the *Data as of* equals a past date the field will be colored dark peach.

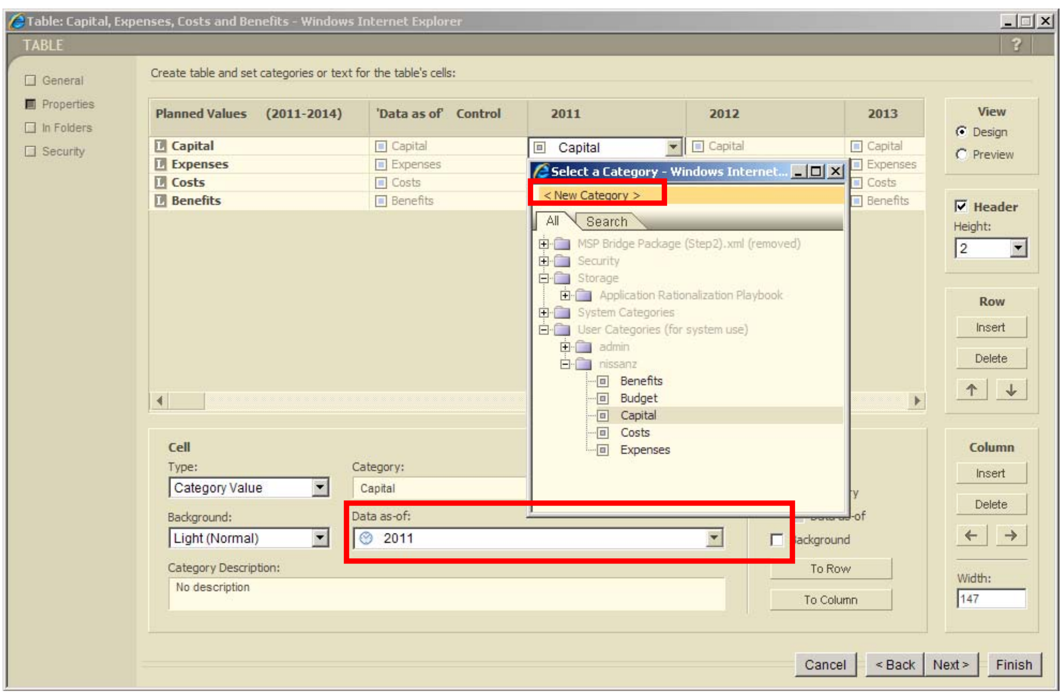
~ Category Validation, which applies to the Values of categories whose value type is either integer, float, text or date, will continue to validate the input into the categories of the Category and Cat. (text area) components whether they display the default current value of the Category (<User-selected>) or any other date or version of the category, whether set by the configurator in one of the wizards or by the end-user via the *Data as of* control:

b. Table

The *Data as of* date of each Table Category cell can be set either per cell in the Properties step of Table wizard or by the end-user via the *Data as of* control in the Form/Dashboard module. This will affect all of the following types of table cells: Category Value, Category Indicator and Category Annotation.

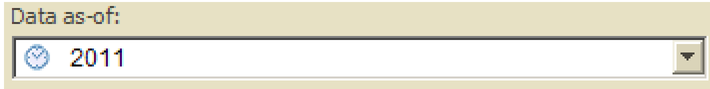
Note: If the Category Value is a *Value List* and it is *Filtered by* another category, then the filtering category is also set to the data point set in the Table wizard. (If there is a hierarchy of filtering categories which filter this category these too will be set by the *Data as of* date for this category).

~ Pre-configuring a Table Category Cell with a *Data as of* date/version



- After selecting the table cell type from the *Type* field (Category value, Category indicator or Category annotation) select a category by popping up the Select a Category pop-up list from the table cell.

  Note: To create a new category select the <New Category> option at the top of the pop-up list.

- 

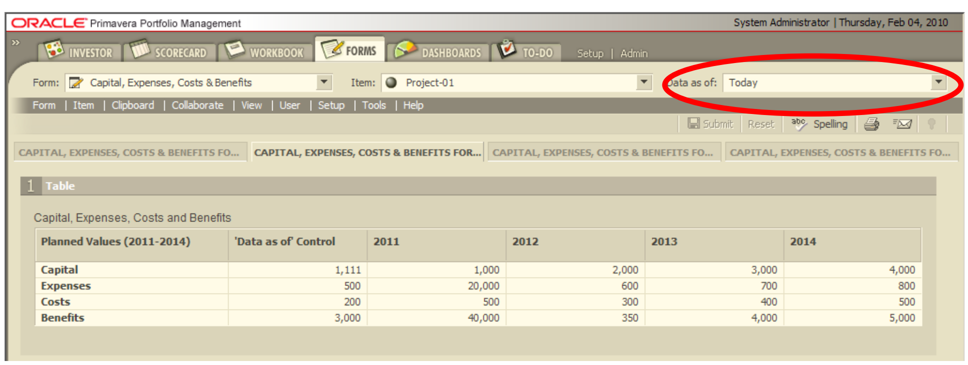
 - The date or version of the selected category data is determined by the new *Data as of* field, located beneath the *Category* field and *Edit* button. Clicking on a *Data as of* cell pops up the Select a Version pop-up list. For a detailed description of its functionality see the **[Select a Version pop-up list for Configurators](#)**.

~ Evaluation of the Table category cell's *Data as of* date/version in the Form/Dashboard module

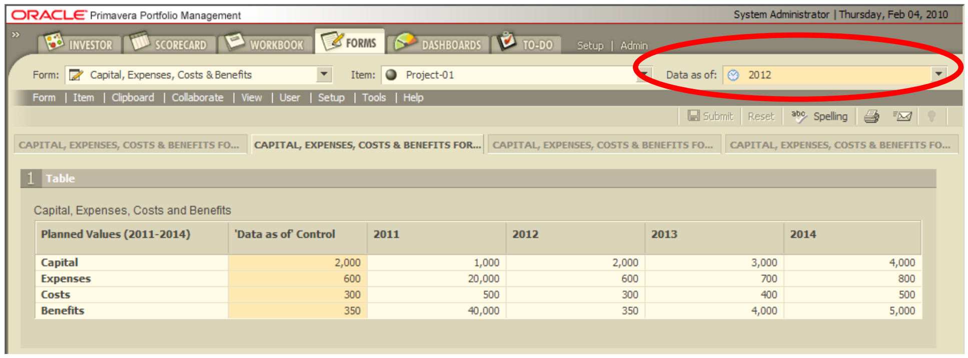
- If a Table Category cell's *Data as of* date has been set to a specific date or version in the Table wizard, then the data displayed or input will be according to the date/version set in the Table wizard, and not according to the date/version set by the end-user via the *Data as of* control.

- If the Data as of date assigned in the Table wizard is <*User-selected*>, then the data displayed or input will be according to the date/version set by the end-user via the *Data as of* control.

  - If the *Data as of* control = 'Today' (the default) the data displayed is <Current> with the normal background color for that cell.



- If the *Data as of* control = a date or version (even if the date or version is equal to today's date), then the background of that table cell will be colored as follows:



  - ➢ If the cell is enabled it will be colored peach (the same color as that of the background of the *Data as of* control). The cursor will change from its standard arrow form to its *Data as of* form which adds a clock face to the arrow - 

  - ➢ If the cell is disabled it will be colored dark peach. The cursor will change from its standard darkened arrow form to its *Data as of* form which adds a clock face to the arrow - 

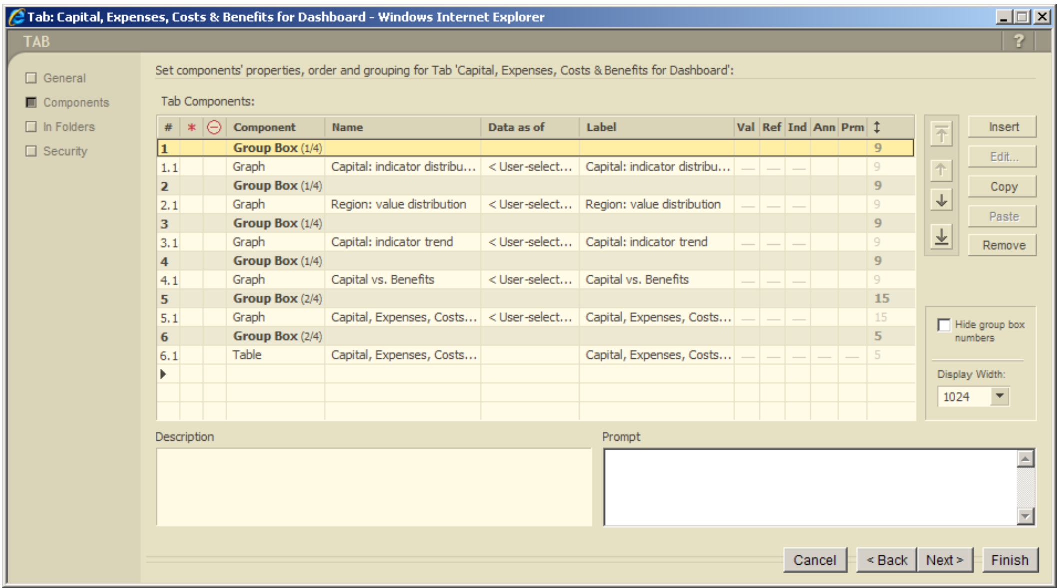
    Note: If the cell is an enabled when the *Data as of* control equals 'Today' but is disabled when the *Data as of* control is set to a past date (e.g., when the end-user has permission to edit current data but not past data) then when *Data as of* = 'Today' the cell will be colored white, while when the *Data as of* equals a past date the cell will be colored dark peach.

~ Category Validation, which applies to the Values of categories whose value type is either integer, float, text or date, will continue to validate the input into the Category Value cells of the table whether they display the default current value of the Category (<User-selected>) or any other date or version of the category, whether set by the configurator in one of the wizards or by the end-user via the *Data as of* control:

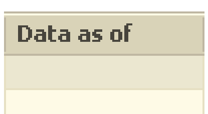
c. Graph

The *Data as of* date of each Graph component can be set either per graph in the Components step of the Tab wizard or by the end-user via the *Data as of* control in the Form/Dashboard module. This will affect all data displayed in any of the graphs but not the graph annotation. The same graph annotation displays regardless of the date or version of the graph.

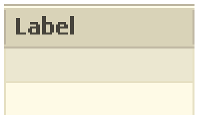
~ Pre-configuring a Graph with a *Data as of* date/version



- After selecting the Graph component in the **Component** column, select a graph in the corresponding cell in the **Name** column. (Note that the **Component** column precedes the **Name** column.)

- 

 - The date or version of the Graph data is determined by the new *Data as of* field, located between the *Name* and *Label* columns. It affects all graph types; Trend, Distribution, Scatter and Column-bar. (The Data as of value of the Column-bar graph is always set to '<User-selected>' and is disabled. Any pre-configuration of its data must be made in the table upon which it is based). Clicking on a *Data as of* cell pops up the Select a version pop-up list. For a detailed description of its functionality see the **Select a Version pop-up list for Configurators**.

- 

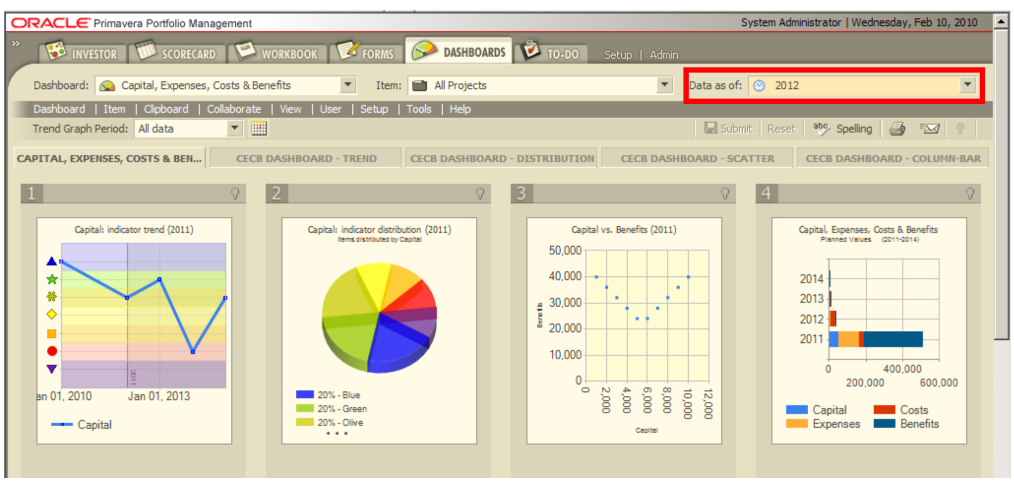
- the Label field can be used to indicate the *Data as of* date or version in addition to the Name of the Graph. The label default reflects the different kinds of *Data as of* values as follows:

  - If *Data as of* = '<User Selected>' then the *Label* = *Name*
  - If Data as of = any Date then the *Label* = *Name* + (Date)
  - If *Data as of* = Version then the *Label* = *Name* + (Version name)

  Note: If the *Label* field has not been manually defined or erased then it changes dynamically when the *Name* or *Data as of* fields are changed. Once the label has been manually changed, updates to the *Name* or *Data as of* fields are no longer automatically reflected in the label.

~ Evaluation of the Graph's *Data as of* date/version in the Form/Dashboard module

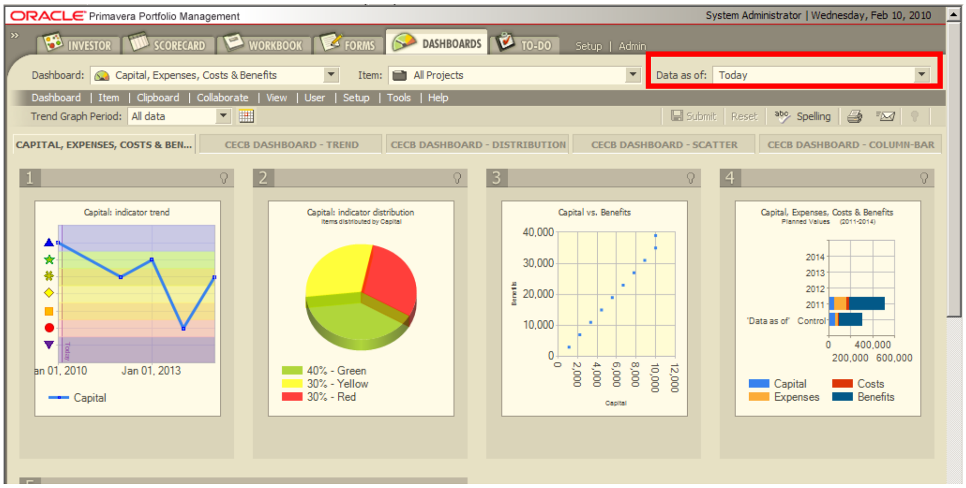
- If the *Data as of* date of a Graph component has been set to a specific date or version, then the Graph will display according to the date/version set on the tab, and not according to the date/version set by the end-user via the *Data as of* control.



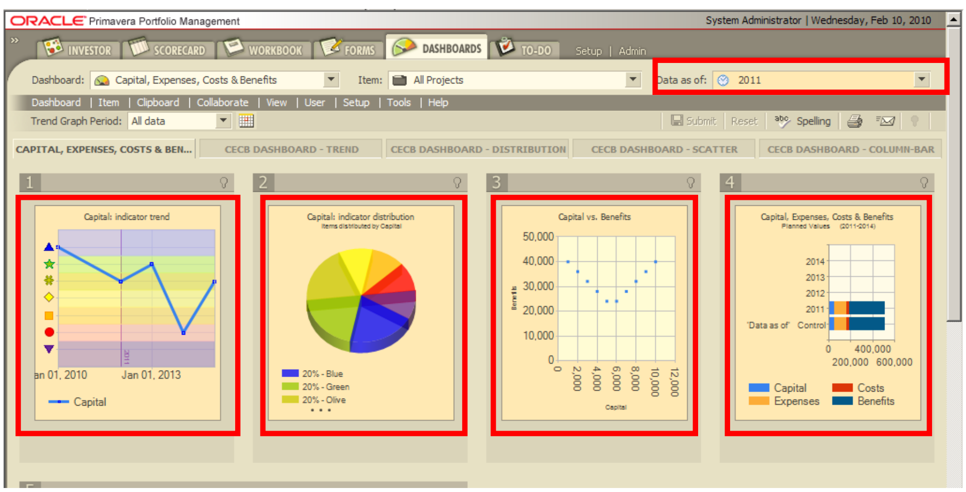
  - The actual *Data as of* date/version can be displayed on the tab via the Graph label, which by default is 'Name of Graph (Date/Version)'

- If the *Data as of* date of a Graph component is left at its default <*User-selected*>, then the Graph will display according to the date/version set by the end-user via the *Data as of* control.

- If the *Data as of* control = 'Today' (the default) the Graph is displayed according to <Current Data> with the normal background color for the graph.

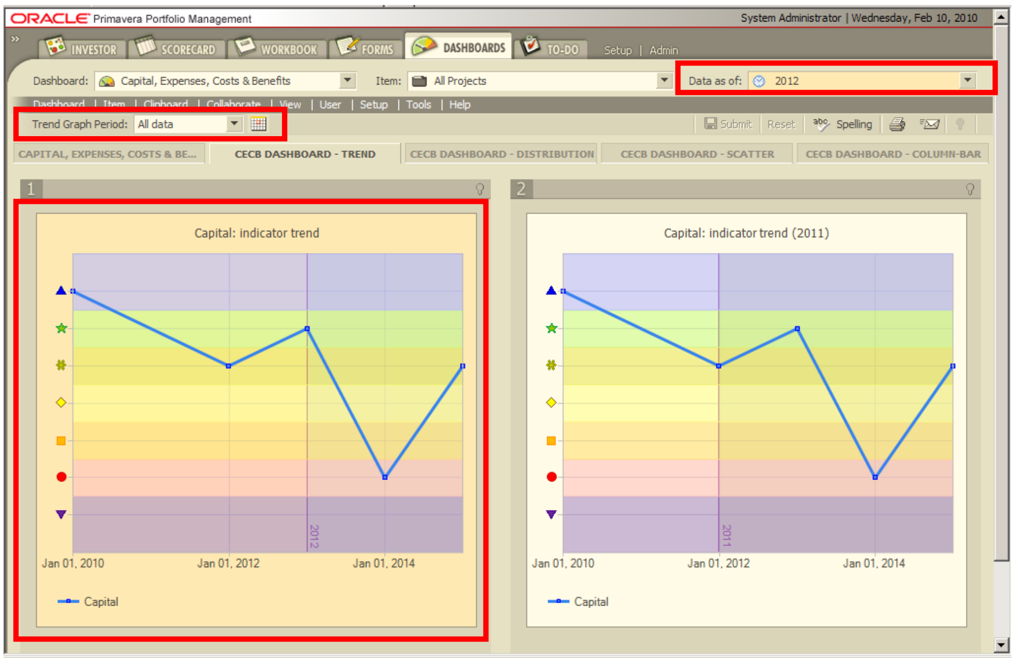


- If the *Data as of* control = a date or version (even if the date or version is equal to today's date) then the background of the graph will be colored peach, the same color as that of the background of the *Data as of* control.



~ Additional *Data as of* issues per graph type

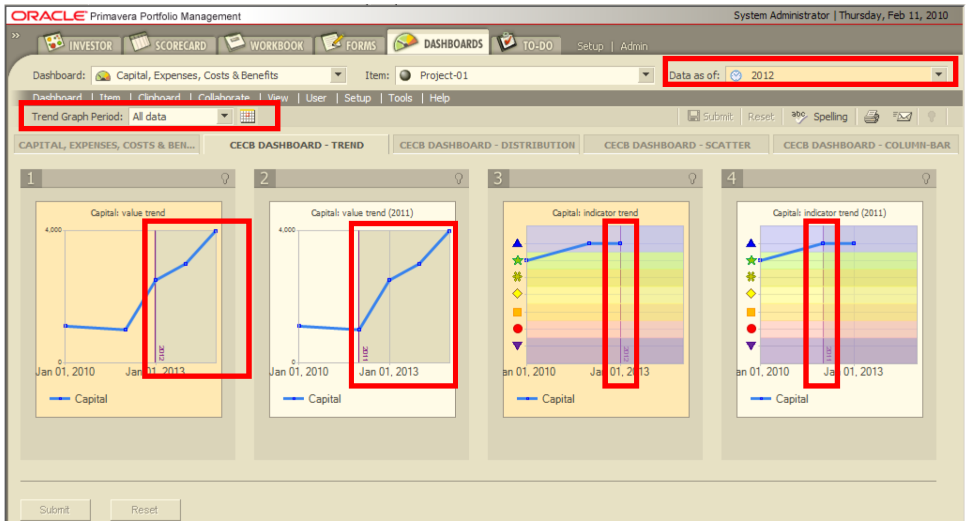
- Trend graph



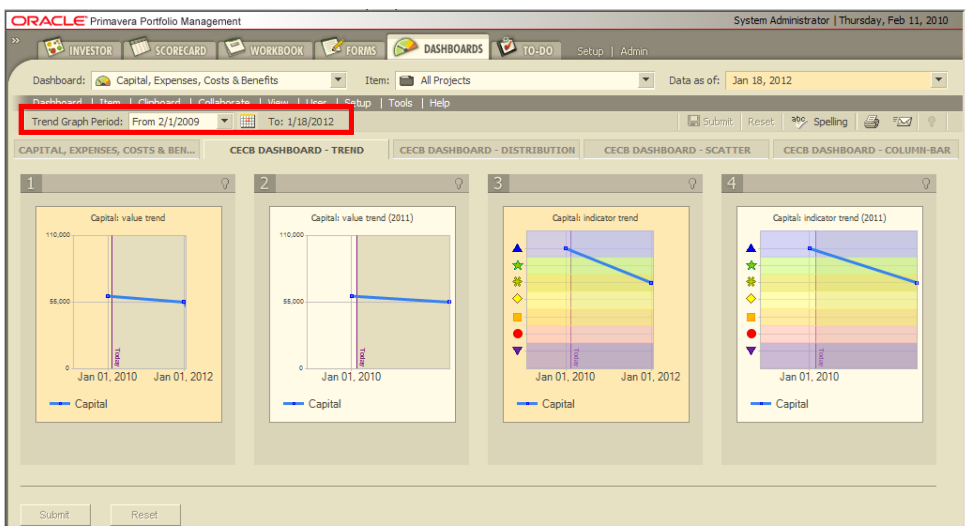
  - Displays the Trend graph's data points for all of the *Series* step categories (and their Reference Categories if any, if so defined in the Properties step of the Graph wizard) up until the date/version defined in the Tab's *Data as of* column (or that of the *Data as of* control in the module, if the Tab's *Data as of* = '<User-selected>'). The beginning of the Trend graph is defined by the date or period selected in the Trend Graph Period drop-down list, found on the left of the module immediately beneath the menu bar.

    Note: The end of the Trend period of the graph on the left is determined by the date/version set in the *Data as of* control in the module, while the end of the Trend period of the graph on the right was determined by the *Data as of* date/version set in the Tab/Components step.

  - If the Trend Graph Period dropdown = 'All data' then all past, present and future data points will be displayed regardless of the *Data as of* date/version set by the configurator or end-user. The end point determined either by the configurator (via the *Data as of* field in the Tab/Components step) or by the end-user (via the *Data as of* control in the module) will be delineated by a line with its date or version. If the graph has not been defined (in its Properties step) to show Indicator boundaries, then the entire area to the right of this *Data as of* line will be shaded.



- *Trend Graph Period* control modifications:



➢ The control has moved from the upper right-hand corner of the Form/Dashboard module to the left of the ProSight toolbar. It appears only when the active **Tab** contains a trend graph

➢ 

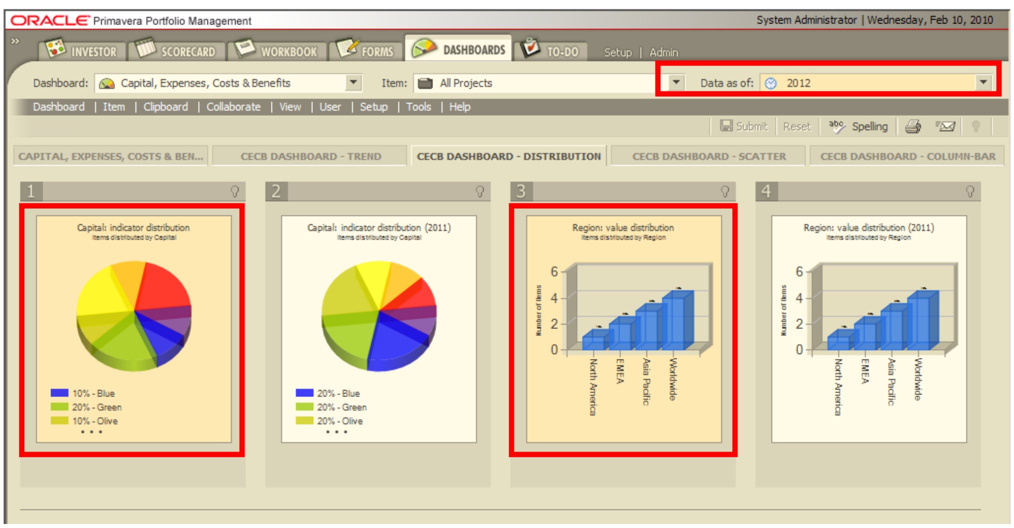
- the *Trend Graph Period* field remains the same continuing to define either the beginning of the Trend (i.e., ‘From: June 8, 2008’) or the length of the Trend Period (i.e., ‘3 months’).

- ➢ A *To* section, defining the end of the Trend period, has been added. This displays the contents of the *Data as of* control, ‘Today’, a calendar date or a name of a version.

- ➢ If the *Trend Graph Period* = ‘All data’ then the *To* label and the *Data as of* control value do not appear to the right of the Trend Graph Period drop-down.

- ➢ If the *Trend Graph Period* = a calendar date, then the *To* period is determined by the value displayed in the *Data as of* control, and does not include all points from that calendar date as in previous versions.

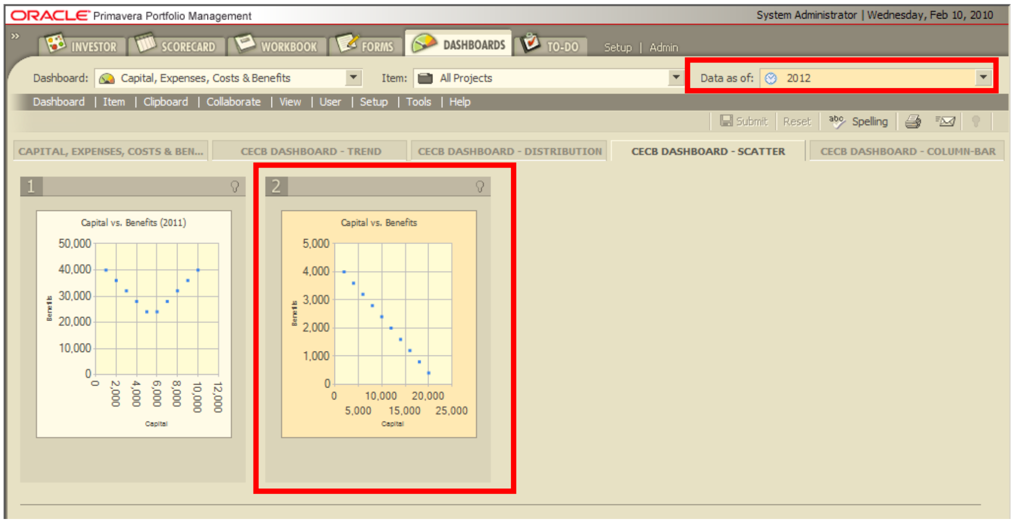
- Distribution graph



- ▪ Displays the *Distributed by* and *Weighted by* fields at the data point defined in the Tab’s *Data as of* column (or that of the *Data as of* control in the module, if the Tab’s *Data as of* = ‘<User-selected>’)

  Note: The category values of the Distribution graphs with the normal backgrounds were determined by the *Data as of* date/version set in the Components step, while the category values of the Distribution graphs with the peach-colored backgrounds were determined by the version set in the *Data as of* control.

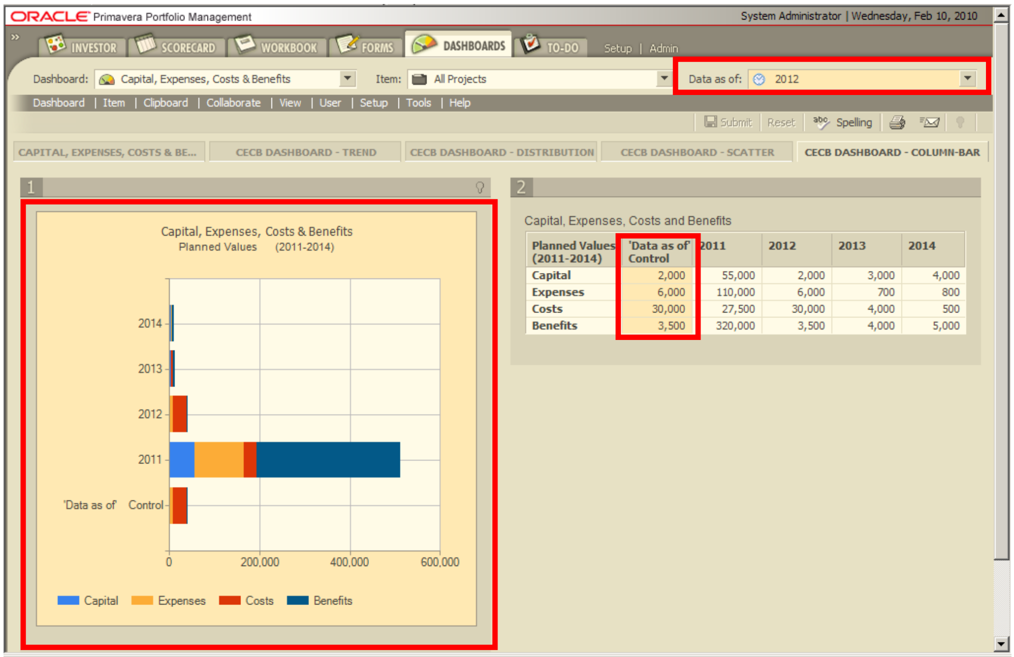
- Scatter graph



  - Displays the *X-axis* and *Y-axis* points at the data point defined in the Tab's *Data as of* column (or that of the *Data as of* control in the module, if the Tab's *Data as of* = '<User-selected>')

    Note: The category values of the Scatter graph on the left were determined by the Data as of date/version set in the Components step, while the category values of the Scatter graph on the right were determined by /date version set in the *Data as of* control.

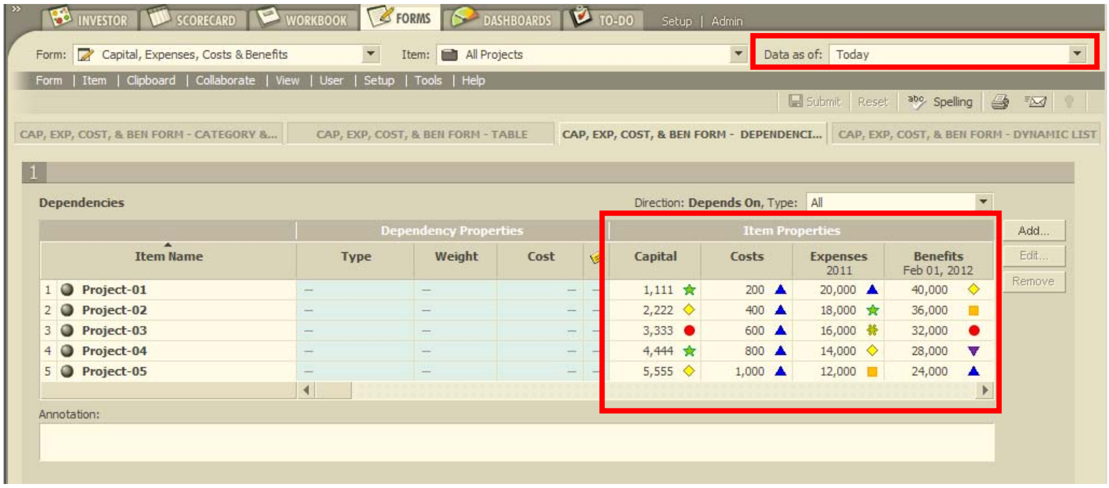
- Column-Bar graph



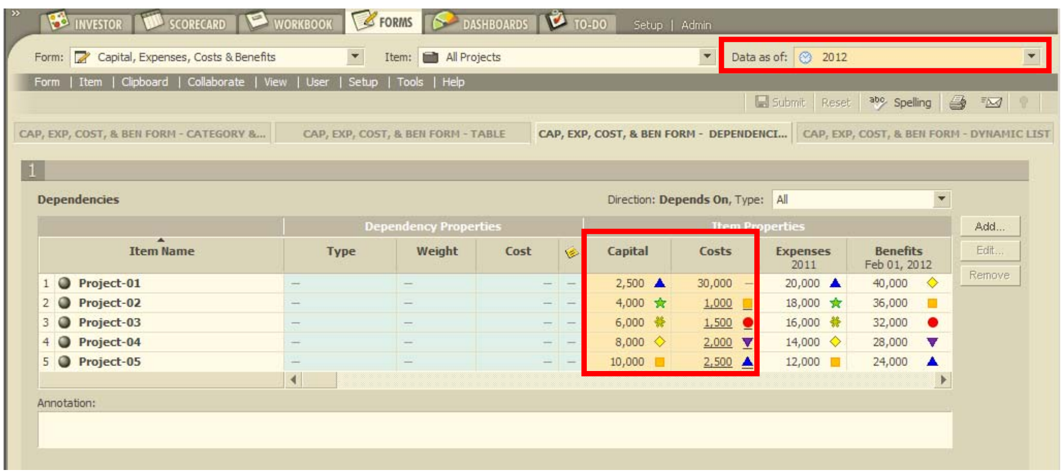
- Displays the column-bar graph according to the *Data as of* date or version set in each category cell of the table upon which this column-bar graph is based.
- If a category cell's *Data-as of* value = <User-selected> then this cell's date or version is determined by the *Data as of* date or version set by end-user via the *Data as of* control (since the *Data as of* value of Column-bar graph in the Tab component is always <User-selected>).
- If at least one category cell of the table defining a Column-bar graph is affected by the module *Data as of* control (its *Data as of* value is <User-selected>), then the entire background of the graph will be colored peach. Only if **none** of the table's category cells are user-selected, its background will not be colored peach.

d. Dependencies List

The *Data as of* date/version of each Item Properties category can now be set not only by the configurator (as was the case in 7.5 - per category in the scorecard wizard accessed from the Tab/Component's step Dependencies List dialog box), but also by the the end-user via the *Data as of* control in the Form/Dashboard module. This affects category values and category indicators but not values of reference categories (since they are not displayed in the Dependencies List).



~ Evaluation of the *Data as of* date/version of the Item Property categories in the Dependencies List when displayed in the Form/Dashboard module



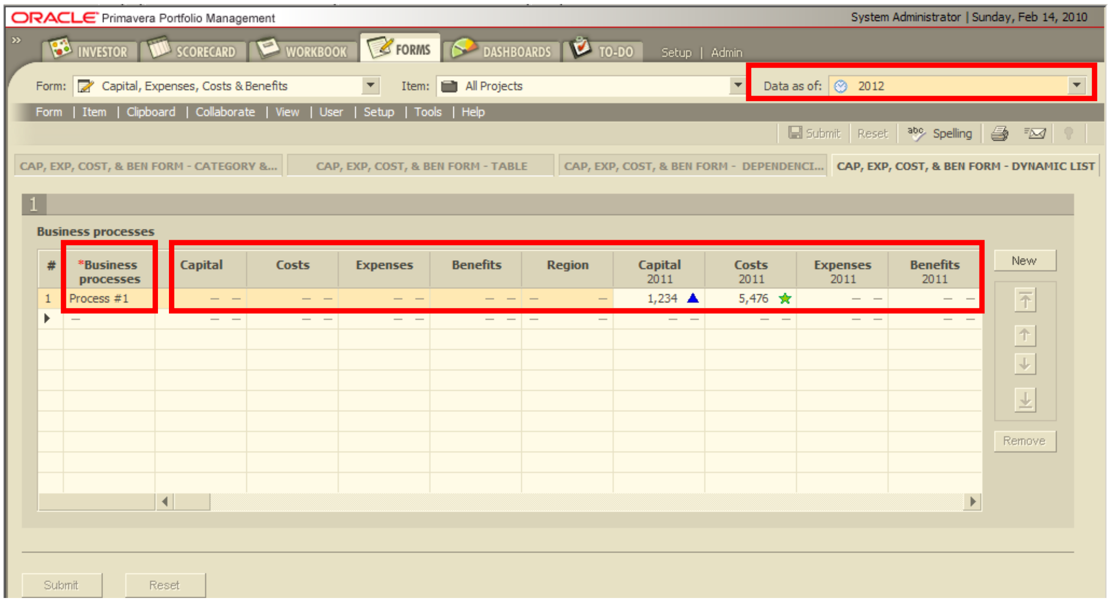
- For categories that have been assigned *Data as of* dates/versions in the scorecard wizard, the data displayed for these categories will be according to these dates/versions, and not according to the date/version set by the end-user via the *Data as of* control. Their background color will be normal.
- For categories whose *Data as of* value in the scorecard wizard is <*User-selected*>, the data displayed will be according to the date/version set by the end-user via the *Data as of* control.
    - If the *Data as of* control = 'Today' (the default), the category data displayed is <Current>, and the background color of the category columns will be normal.

- If the *Data as of* control = a date or version (even if the date or version is equal to today's date), then The category data displayed is according to that date/version, and the background of the category columns will be colored peach, the same color as that of the background of the *Data as of* control.
- Cursor support – When switching the *Data as of* control from 'Today' to a specific date or version the cursor hovering over a cell changes from a shaded pointer with a Read-only (No-entry) sign (since Item Properties are disabled for input entry) to a shaded pointer with a clock ( ).
- When this same Dependencies list will be displayed in the Work book module Item Properties with a pre-configured *Data as of* date/version will display their data accordingly. Item Properties pre-configured to <User-Selected> will always display the current data since there is no *Data as of* control in the Workbook module.

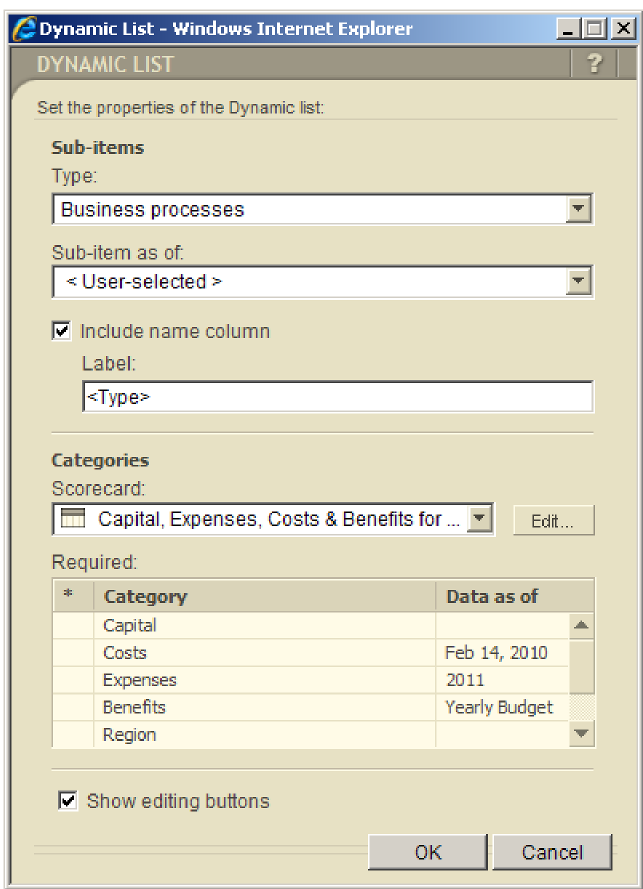
e. Dynamic List component

The *Data as of* date/version of each Sub-item name and category can be set either by the configurator via the Tab/Component's step Dynamic List dialog box (the categories' scorecard must be accessed from there to set their *Data as of* dates/versions), or by the end-user via the *Data as of* control in the Form/Dashboard module. This affects both the display and input of the sub-item names and category values & indicators (but not values of reference categories since they are not displayed in the Dynamic List).

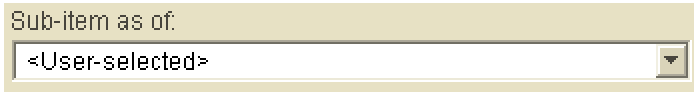
Note: If one of the categories is a *Value List* type and it is *Filtered by* another category, then the filtering category is also set to the *Data as of* date/version set for this category. (If there is a hierarchy of filtering categories which filter this category these too will be set by the *Data as of* date for this category).



~ Pre-configuring the Dynamic List's Sub-items and Categories with *Data as of* dates/versions



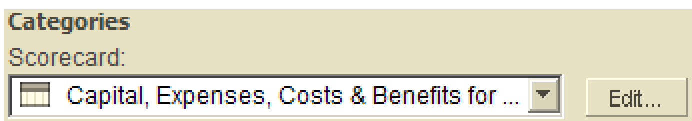
To reflect the fact that the Dynamic List consists of two different sections; **Sub-items** and **Categories**, the Dynamic List dialog box has been divided into two sections accordingly.

- 

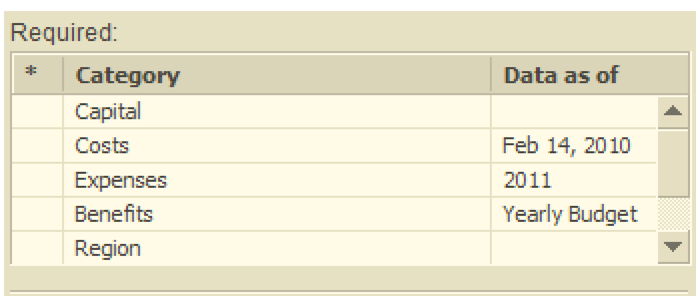
- *Sub-item as of* field, has been added between the *Type* drop-down field and the *Include name column* checkbox in the Sub-items section. This field determines the sub-items to be displayed as of the date or version indicated, as follows:

  - Those sub-items which were enabled at that time of the date/version
  - The names of the sub-items at that time
  - Their serial order in the dynamic list at that time

  Clicking on the *Sub-item as of* field pops up the Select a Version pop-up list. For a detailed description of its functionality see the **[Select a Version pop-up list for Configurators](#)**.

- 

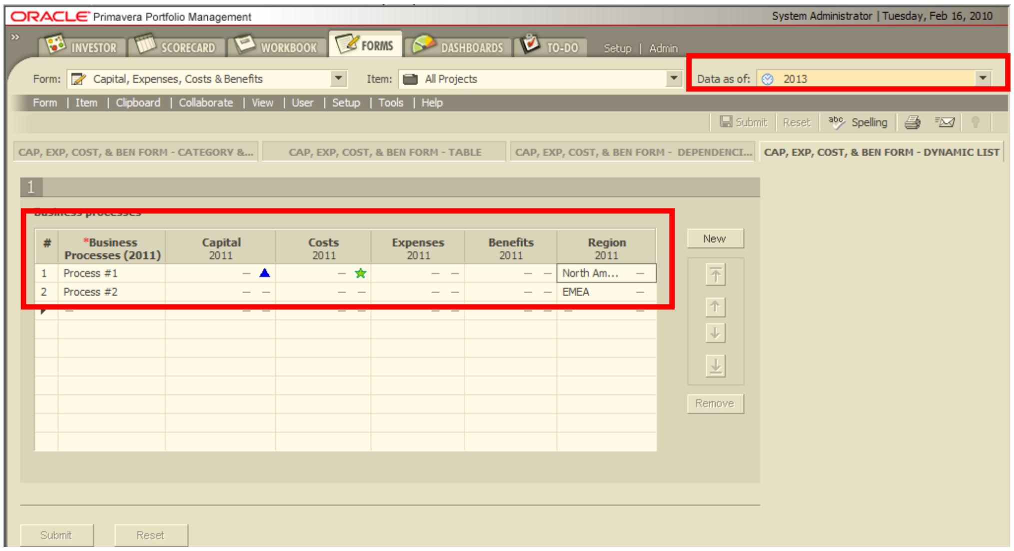
- The *Data as of* dates/versions of the categories are defined in the scorecard selected in the Scorecard field of the Categories section.

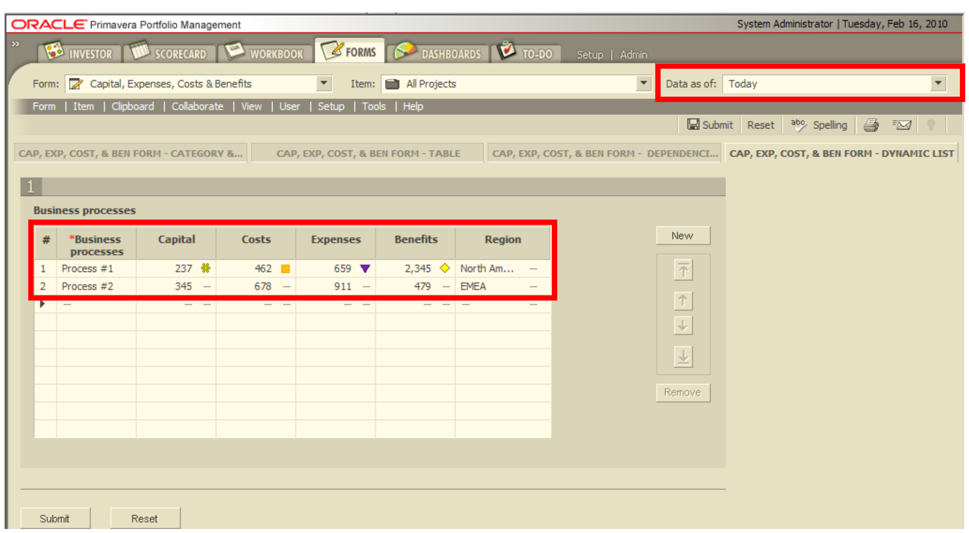
  - The categories and their *Data as of* dates/versions appear in the *Required* table. The *Data as of* column displays the *Date Label* of each category as it would appear in the selected scorecard module. Neither of these columns are editable

~ Evaluation of the *Sub-item* and *Data as of* date/version in the Dynamic List when displayed in the Form/Dashboard module

- If sub-items have been assigned a *Sub-item as of* date/version in the Dynamic List dialog box and categories have been assigned *Data as of* dates/versions in the scorecard wizard, the sub-items displayed and the data displayed for these categories is determined by the dates/versions set by the configurator, and not by by the end-user via the *Data as of* control.

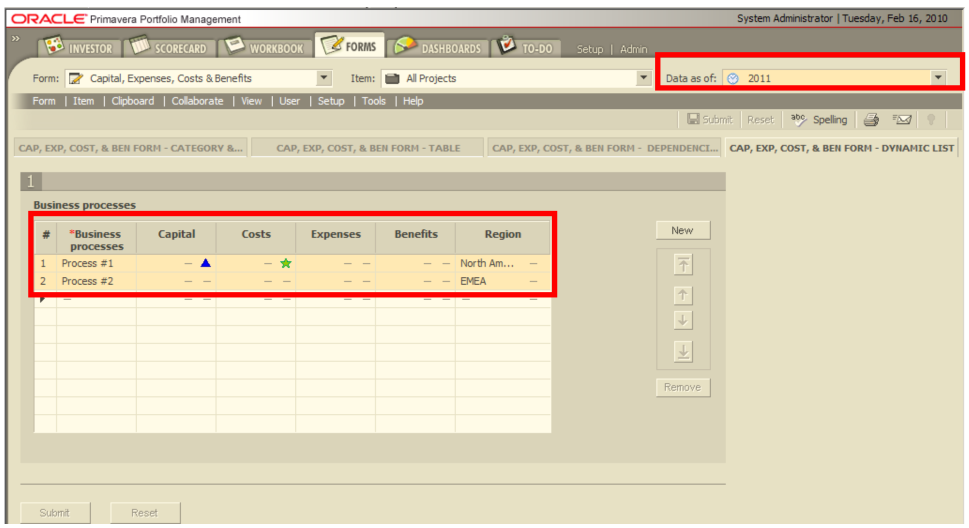


- If the *Sub-item as of* in the Dynamic List dialog box is *<User-selected>* and the categories' *Data as of* value in the scorecard wizard are *<User-selected>*, the sub-items and category data displayed will be determined by the date/version set by the end-user in the *Data as of* control.
  - If the *Data as of* control = 'Today' (the default)



- ➢ The category data displayed is <Current>.
- ➢ The list of sub-items, their names and there order reflect their <Current> status.
- ➢ The background color of the category columns and the Name column will be normal.

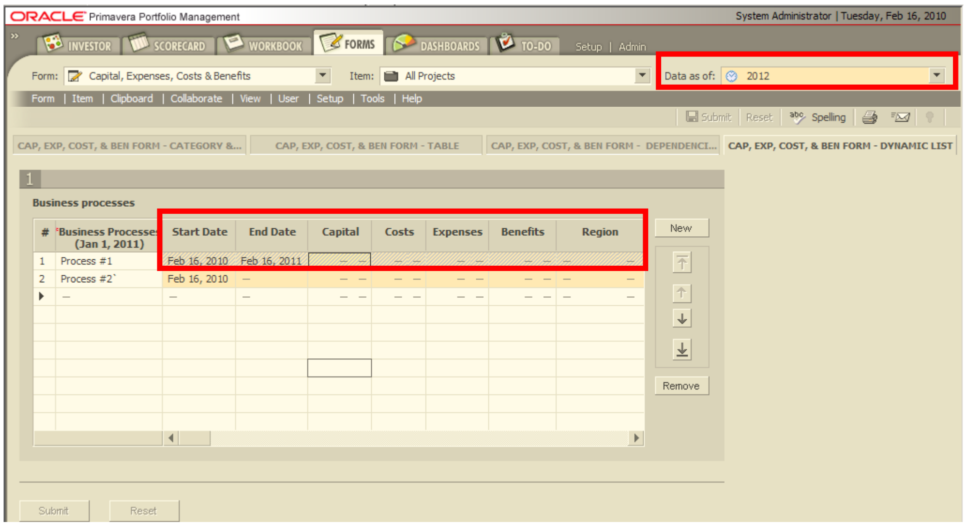
▪ If the *Data as of* control = a date or version (even if the date or version is equal to today's date)



- ➢ The category data displayed is according to that date/version
- ➢ The list of sub-items, their names and their order reflect what they were at that date or version
- ➢ The background color of the category columns and the Name column will be colored peach, the same color as that of the background of the *Data as of* control.
- ➢ When hovering over an enabled cell or sub-item name, the cursor changes from an arrow to a pointer with a clock ( ).

- ➢ When hovering over a disabled cell or sub-item name, the cursor changes from a shaded pointer with a Read-only (No-entry) sign to a shaded pointer with a clock ( ).

  - ▪ The category cells in a Dynamic List will be uneditable and grayed out, if the *Data as of* date or version of the category lies outside the life-span of the sub-item. This is the situation even if the end-user has edit security on past data.



~ Category Validation, which applies to the Values of categories whose value type is either integer, float, text or date, will continue to validate the input into the categories of the Dynamic List categories whether they display the default current value of the Category (<User-selected>) or any other date or version of the category, whether set by the configurator in one of the wizards or by the end-user via the *Data as of* control:

~ Removal and creation of sub-items

- Sub-items which have been removed from a Dynamic List are only disabled but not removed from the database. This allows them and their data to be displayed for *Data as of* dates prior to their removal.

  - ▪ Nevertheless, a sub-item created and removed on the same day will be deleted and not just disabled when removed by the end-user, even if data has already been entered for it.

- A sub-item exists from the *Data as of* date in which it is created until the *Data as of* date that it is explicitly removed.

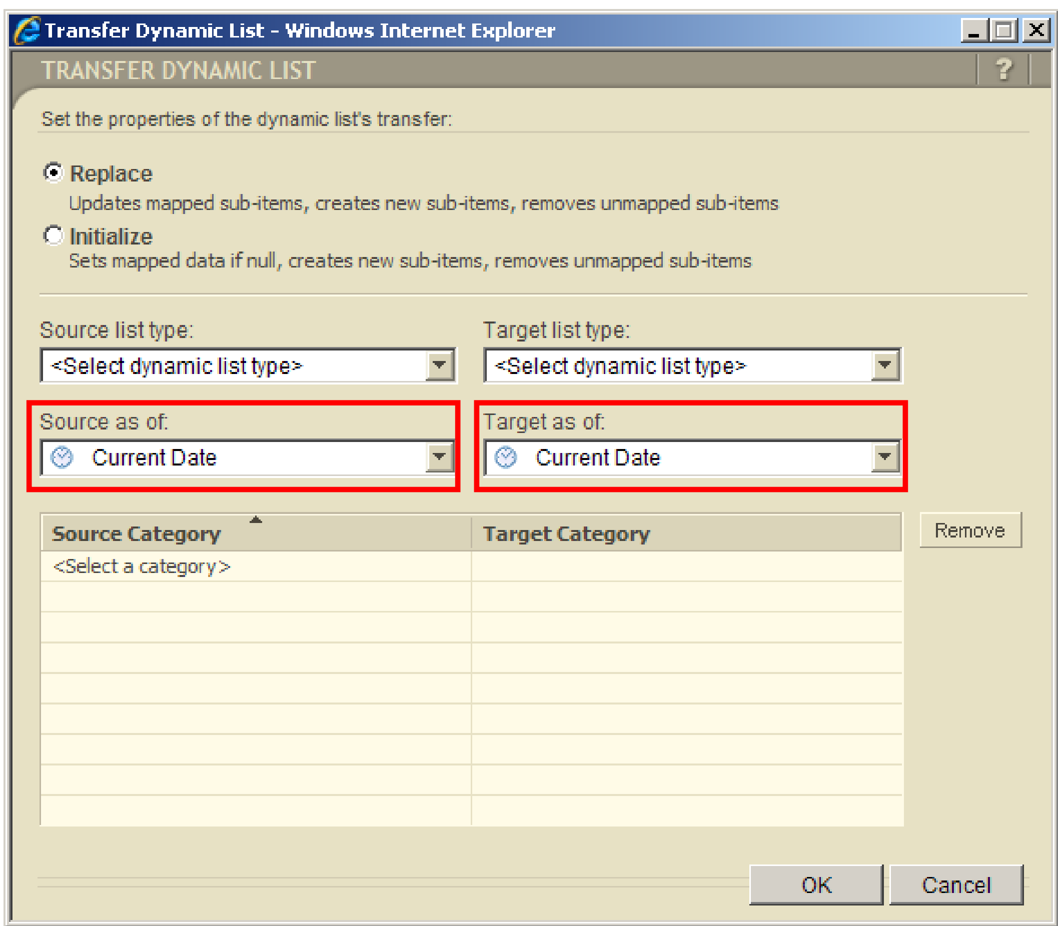
- If a sub-item has been removed and then displayed in the past prior to its removal, an additional removal of it at this point will move back its disable date to the currently displayed *Data as of* date. This is the case even if involves losing data which has been entered between the two disable dates.

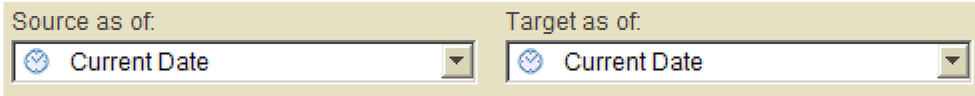
f. Transfer Dynamic List dialog box

The *Data as of* date/version of both the Source and Target sub-items and lists of categories can be set by the configurator via the Tab/Component's step Transfer Dynamic List dialog box.

Note: Since neither of these fields support a <User-selected> option, they are not affected by any end-user change of date/version via the *Data as of* control in the Form/Dashboard module.

~ Pre-configuring the Transfer Tool's *Source as of* and *Target as of* dates/versions for the Source and Target sub-items and lists of categories, respectively





Source as of and *Target as of* pop-up fields for setting the Source and Target sub-items and category data respectively, have been introduced into the Transfer Dynamic List dialog box. Clicking on either of these fields pops up the Select a Version pop-list. For a detailed description of its functionality see the **Select a Version pop-up list for Configurators**.

Note: Since the Transfer Tool's "as of" date is not supposed to be adjustable by the end-user, the <User-selected> option does not appear. Therefore this instance of the version tab tree, differs from all other configurator instances of the Versions tab tree in that the <User-selected> option does not appear. The default value for the *Source as of* and *Target as of* fields is the 

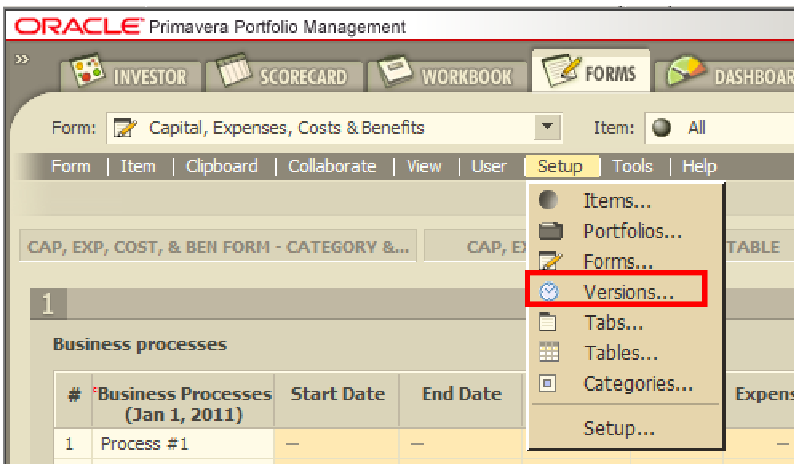
system version.

~ Evaluation of the *Source as of* and *Target as of* dates/versions in the Transfer Dynamic List dialog box when displayed in the Form/Dashboard module

When the Transfer Tool checkbox is checked and the form is submitted, the values of the Transfer Dynamic List's Source categories at the date defined by their *Data as of* date/version will be transferred to the Target categories at the date defined by their *Data as of* date/version.

- If the Source list of sub-items as defined by the Source as of date contains two or more sub-items with the same name, then the submission of the Form/Dashboard will be blocked.

3. Setup menu - includes a Versions... option for opening the Setup module with Versions already selected



4. Export/Print – WYSIWYG export/print of Form/Dashboard currently displaying User-selected data

Capital, Expenses, Costs & Benefits (Form) / **All** (Item) / **2011** (Data as of: Dec 31, 2011)

Form Report, printed by: System Administrator, **Feb 16, 2010**

CAP, EXP, COST, & BEN FORM - CATEGORY & CAT. (TEXT AREA)

1	Category		
Benefits:	/	–	
Benefits (2011):	/	–	

2	Cat. (text area)	
Description:		
Description (2011):		

3

Business processes:

#	Business processes	Start Date	End Date	Capital	Costs	Expenses	Benefits	Region
1	Process #1			–	–	–	–	–
2	hjk			–	–	–	–	–

CAP, EXP, COST, & BEN FORM - TABLE

1 Table

Capital, Expenses, Costs and Benefits

Planned Values (2011-2014)	2011	2012	2013	2014
Capital				
Expenses				
Costs				
Benefits				

a. The data displayed in the form/dashboard whether current or from a different date/version, whether set by the configurator or by the end-user via the *Data as of* control is that which is exported/printed.

b. User-selected data is printed on peach-colored background (as in module) or gray-tone equivalent. This includes the following components:

~ Category and Cat. (text area) – Value, Indicator, Annotation and Reference category fields

~ Table – for Category Value, Category Indicator and Category Annotation cells

~ Graph backgrounds – when the graph is based on User-selected data

~ Dynamic List - Category columns and the Name column (except for Today, is always User-selected Data)

~ Dependencies List – Category Columns (Item Properties)

c. The 1st line of the form/dashboard header will read as follows: "**Name of Form/Dashboard** (Form/Dashboard) / **Name of Portfolio** (Portfolio) / **Date** (Data as of)/**Version Name**: (Data as of <Calculated date of Version>) "

~ If the *Data as of* = 'Today' the last part of the Printout Header reads: **Today** (Data as of: Jan 6, 2009)

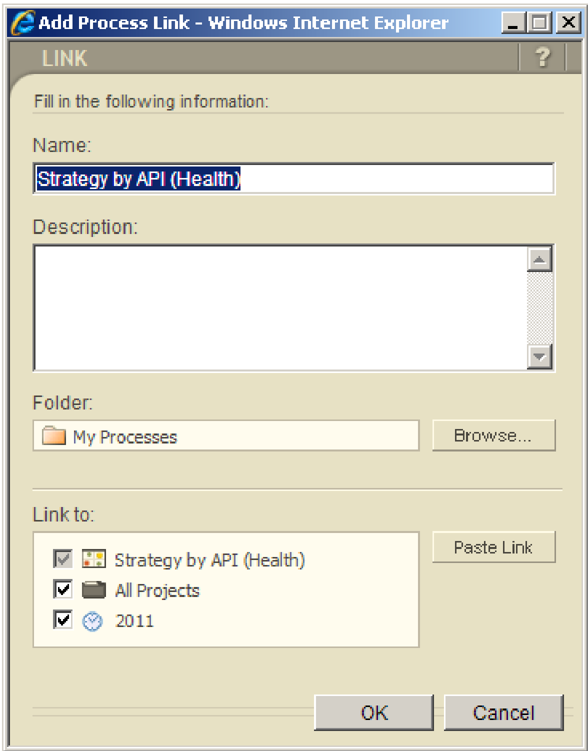
~ If the *Data as of* = a Version name, e.g., 'OMB Submission', the last part of the printout header reads: **OMB Submission** (Data as of: Jun 6, 2007)

~ If the *Data as of* = a date, e.g., Dec 31, 2008, then the last part of the Printout Header reads: **Dec 31, 2008** (Data as of)

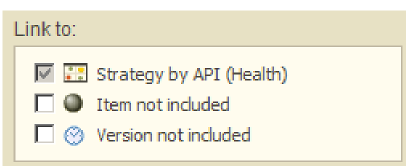
Primavera Portfolio Management Links

All Primavera Portfolio Management links have been upgraded to include a *Data as of* date or version.

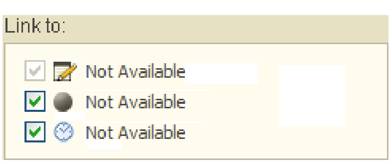
A. My Processes link



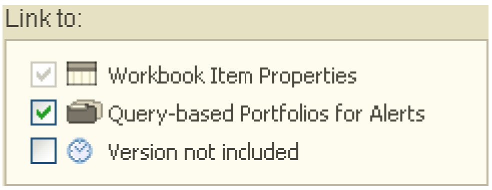
1. When an Item or Version is not included in the link, its checkbox will not be checked and next to it 'Item not included' or and 'Version not included' will be written. The view checkbox will always be checked and disabled.



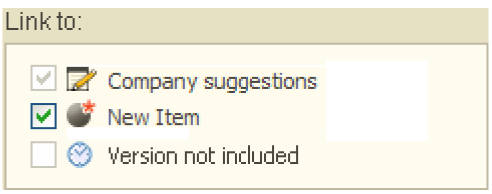
2. If the View, Item or Version defined in the link has been removed from the system, then their icon will be checked and next to the icon will appear the words Not Available.



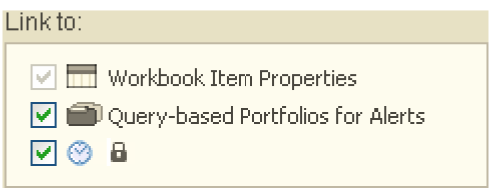
3. Adding a Process Link while a version or date is displayed in the *Data as of* control in the main module, accesses the Link dialog with the version icon already checked, together with the Version name or date. Adding a Process Link while ‘Today’ is displayed, accesses the Link dialog with the version icon unchecked together with ‘Version not included’.



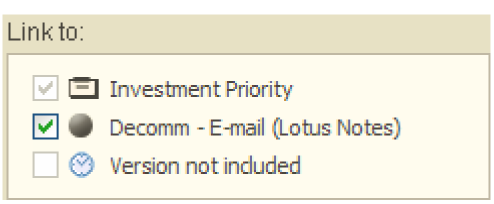
4. This is also the situation when adding a link when the Form is in New Item mode (since clicking on New Item automatically disables the *Data as of* control at “Today”).



5. If the user does not have security for the version in the Process link, the version icon will display a lock as shown below:

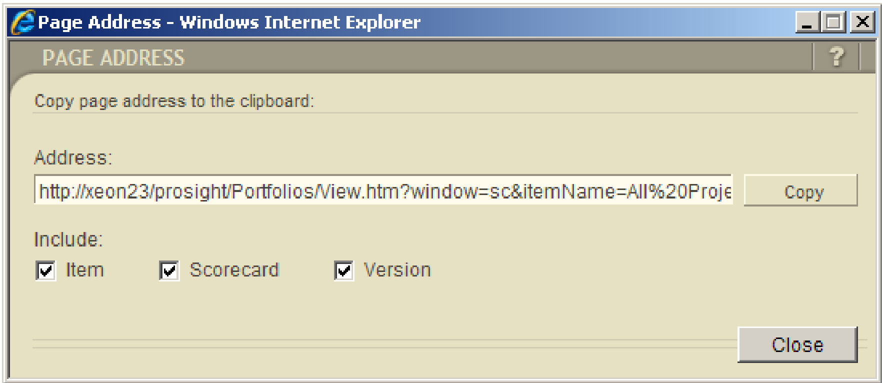


6. The aforementioned changes in the link apply to links generated only from the Investor Map, Scorecard, Forms or Dashboards modules. Since there is no *Data as of* support for the Workbook, links made from the Workbook modules will display a disabled Version not included for the version as shown below:



7. All ProSight Links from previous ProSight 7.5 SP1 and earlier, will access the link at the *Data as of* ‘Today’.

B. Page Address



1. The version or date will be added to the URL in the “Page Address” dialog, and its inclusion or exclusion will be controllable via the additional ‘Version’ checkbox. By default, the Version will be checked and enabled.

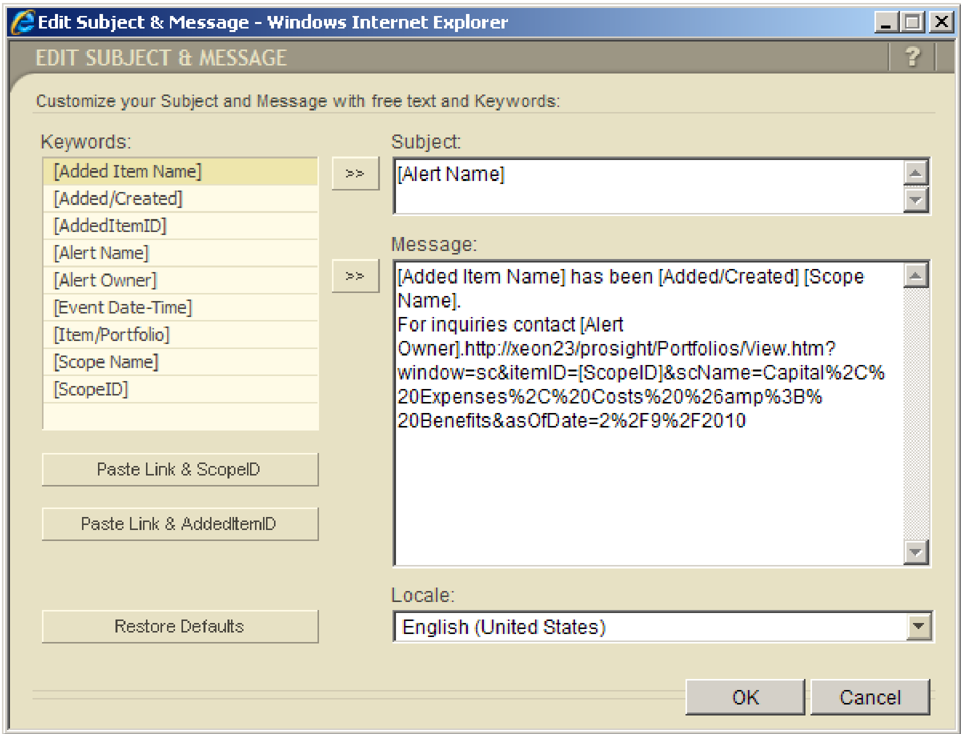
2. This Page Address dialog box and concomitant URL address have been adjusted accordingly for the Investor Map, Scorecard, Form and Dashboard modules. Since the Workbook module does not support the *Data as of* control, obtaining a page address in the workbook will leave the Version checkbox unchecked and disabled and the URL will not include an *asof* parameter.

3. If the *Data as of* field equals “Today”, then the Version checkbox in the *Obtain Page Address* dialog box will be unchecked and disabled.

4. Checking/un-checking the “Version” checkbox will add/remove the *asof* parameter from the address. An address without the version/date parameter will by default navigate to the “Today” value of the *Data as of* date.

5. Addresses from ProSight 7.5 SP1 and earlier will by default navigate to the “Today” value of the *Data as of* date.

C. Alert Message



The alert message's "Paste Link & ScopeID" and "Paste Link & ItemID" buttons will be enhanced to include the version's context in the pasted link.

1. Pressing either of the "Paste Link & ScopeID" or "Paste Link & ItemID" buttons in the Alert Wizard's "Message" step, pastes a link into the "Message" text-box, which includes the version, be it a Version name or calendar date.

2. Alert messages with links from ProSight 7.5 SP1 and earlier will by default navigate to the "Today" value of the *Data as of* date.

D. URL Dispatcher in ProSight

All other places where Primavera Portfolio Management creates URL addresses have been updated to include the additional *asof* parameter for version name or date, as follows:

1. *Send Page* (via control button or Collaborate menu option) in the Investor Map, Scorecard, Forms and Dashboards (but not in the Workbook)

   Note: When the Form/Dashboard is in either New Item Mode or Assign Default Values mode, the URL has not be changed since *Data as of* equals 'Today' in these modes.

2. *Send to Manager* (via menu or drill down) in the Investor Map, Scorecard, Forms and Dashboards (but not in the Workbook)

3. *Add to Favorites* in the Investor Map, Scorecard, Forms and Dashboards (but not in the Workbook).

   Note: When the Form or Dashboard is in either New Item Mode or Assign Default Values mode, the URL should not be changed because the Data as of equals "Today" in these modes.

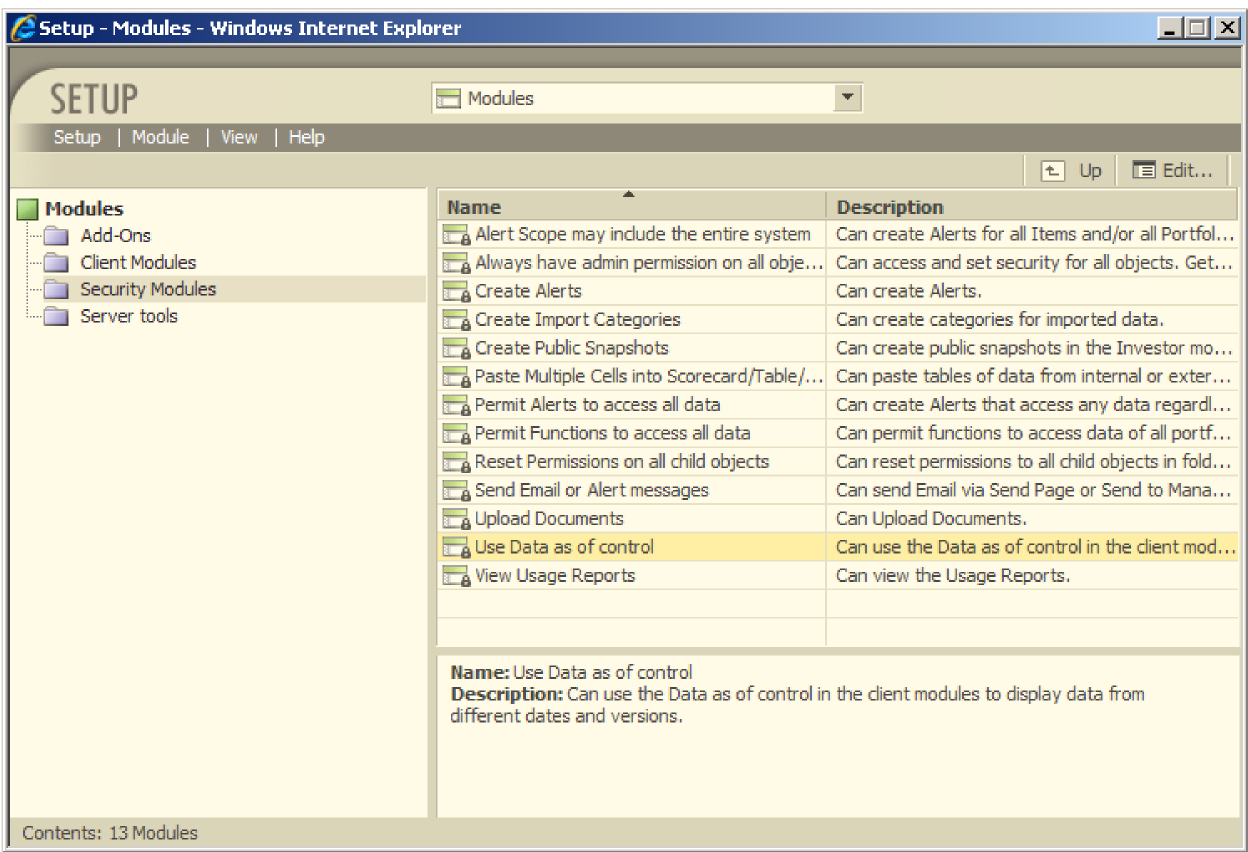
4. Send to Item/Portfolio Manager in the Scorecard

5. *Automatic Dashboard* URL – generated from a scorecard category cell or investor map bubble or folder.

6. *Send to Users* URL - generated from a Users category in the scorecard

7. *Temporary Workbook* URL generated from the Investor map (but not from the workbook)

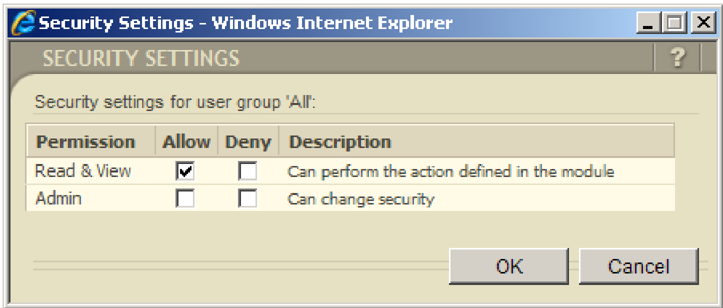
Security Module



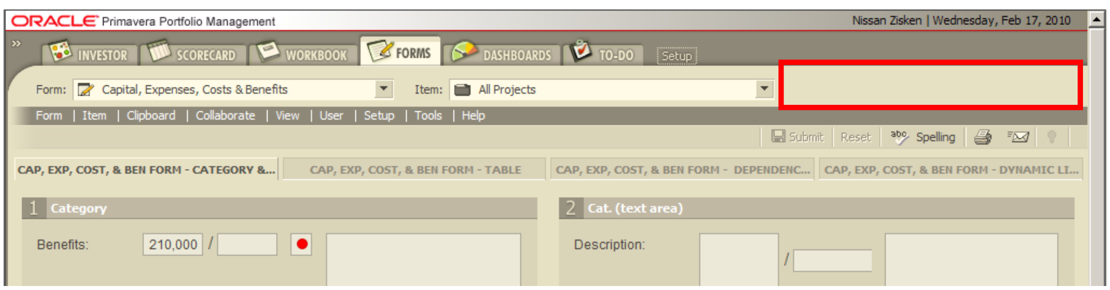
A. 

– Determines who is allowed to use the *Data as of* control in the client modules

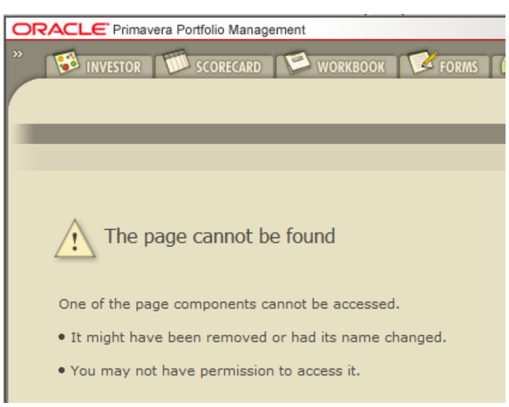
1. **Default Value:** Group='All' – Permission: Read & View=Allow



2. Behavior
   a. When the security module is not allowed, then the Data as of control in the client module is not displayed



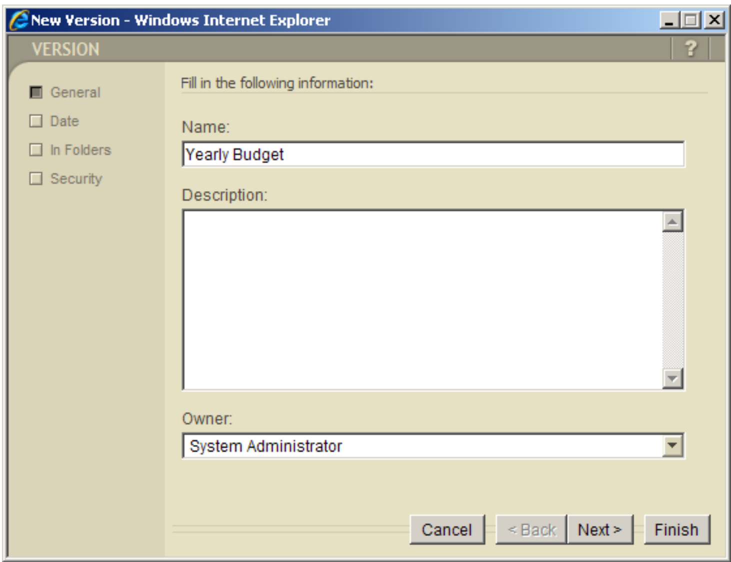
   b. When trying to access links which point to a *Data as of* other than Today, the end-user will receive the following PPM message.



Version wizard

A. General step

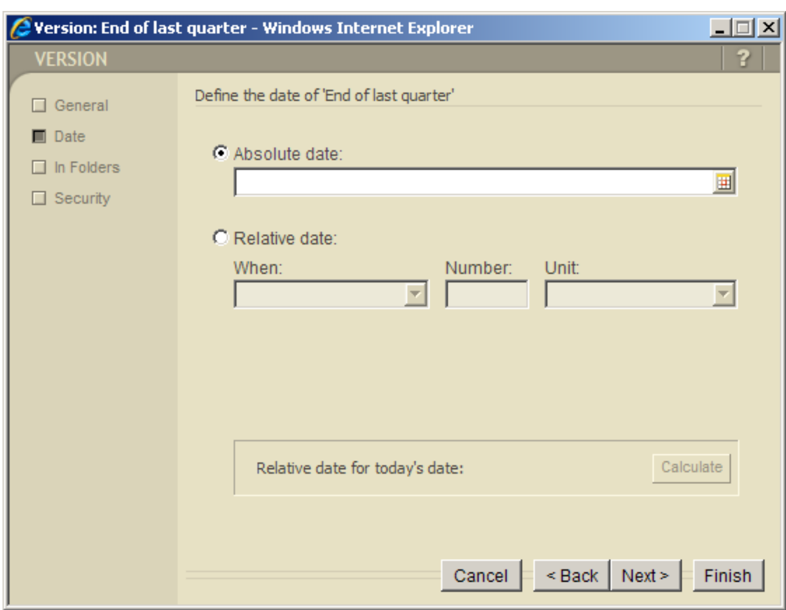
The *Version* wizard's *General* step has standard Primavera Portfolio Management wizard functionality.

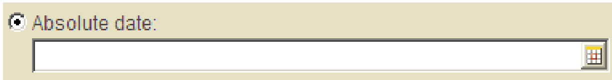


B. *Date* Step

The ***Date*** step is used to define either an absolute or relative date of the version. The different functionality for each of these possibilities is described below:

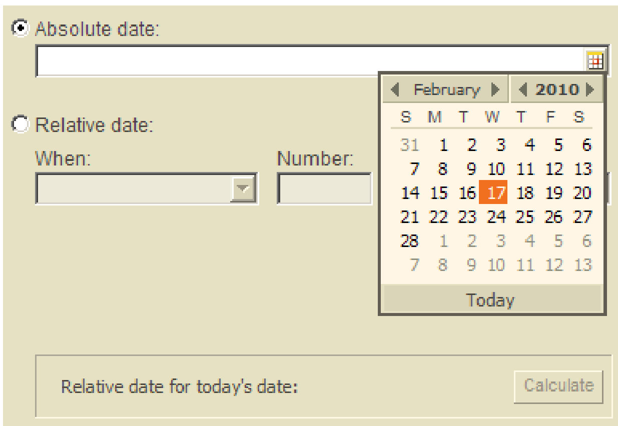
1. Absolute Date



a. 

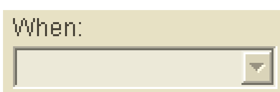
"Absolute date" radio button - On entering the *Date* step for a new version this option is selected by Default.

b.  - the absolute date combo field. Clicking on the field will pop up the calendar widget below for selecting the absolute date. The date can also be entered via the keyboard.



c. 

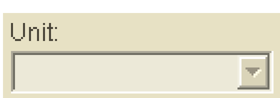
- *Relative date* radio button – for defining a relative date instead of an absolute date

d. 

- "When" drop-down field: – Disabled and empty. Not relevant when defining an absolute date.

e. 

- "Number" text entry field: – Disabled and empty. Not relevant when defining an absolute date.

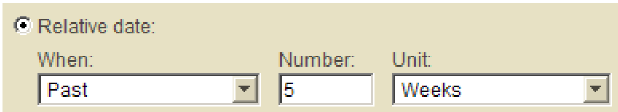
f. 

- "Unit" drop-down field: – Disabled and empty. Not relevant when defining an absolute date.

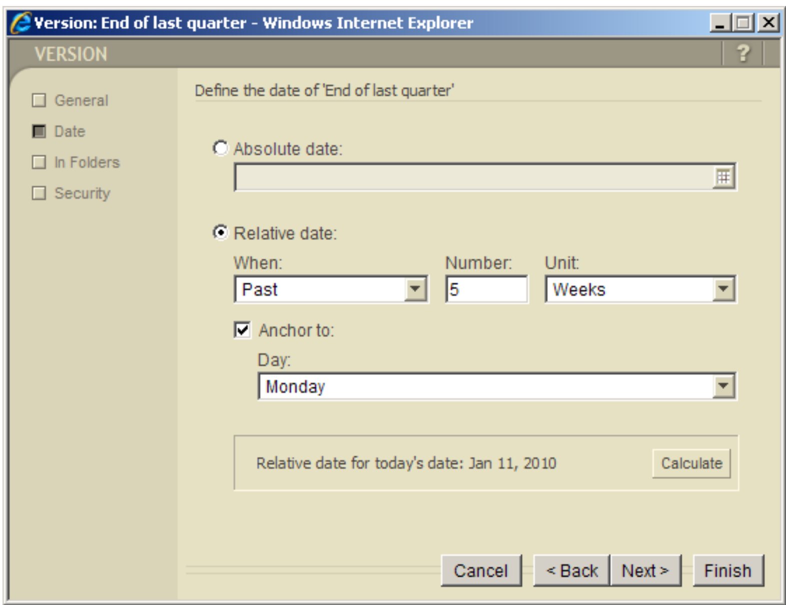
g. 

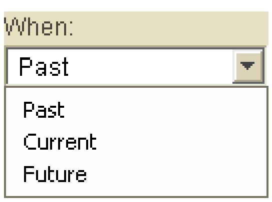
- 'Relative date for today's date:' field empty and 'Calculate' button: disabled. Not relevant when defining an absolute date.

2. *Relative* date

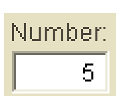


- This defines a date in the current period of time or in the past or future relative to today's date. The relative date parameters vary depending on which of the five time units (*Days*, *Weeks*, *Months*, *Quarters* or *Years*) has been selected.

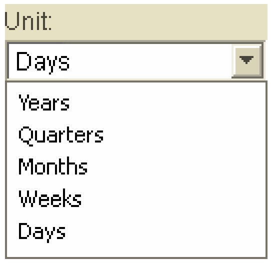


a. 

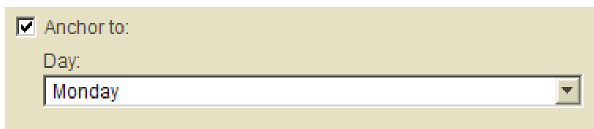
- *When* drop-down field containing the Past, Current and Future options.

b. 

- *Number* text entry field. If the *When* field = 'Current' this field is disabled.

c. 

- *Unit* drop-down field containing the following units: Years, Quarters, Months, Weeks and Days.

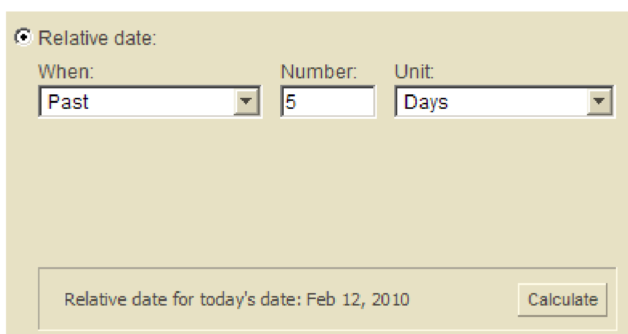
d. 

- *Anchor to* checkbox is used to anchor the date to a specific day within the week, month, quarter or year, defined by the relative date.

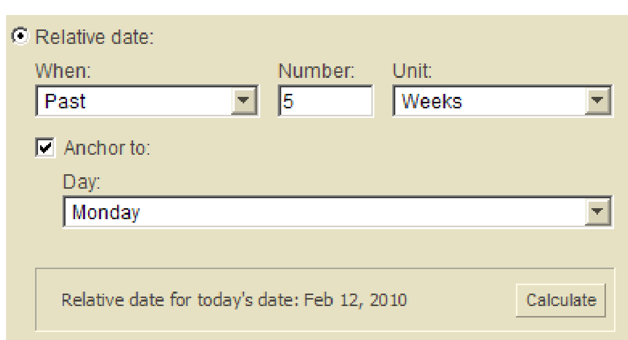
~ If the *When* field = 'Current' then the *Anchor to* checkbox is checked and disabled. (If the *When* field = 'Past' or 'Future' it is not checked and it is enabled

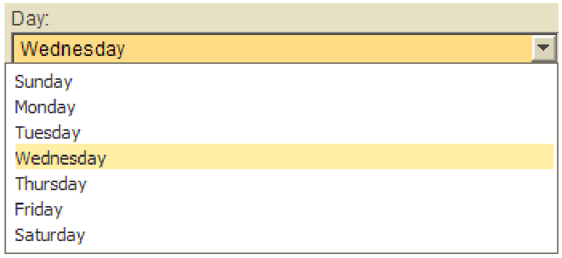
~ The *Anchor to* fields vary according to the *Unit* which has been selected

- When *Unit* = 'Days' – there is no *Anchor to* checkbox



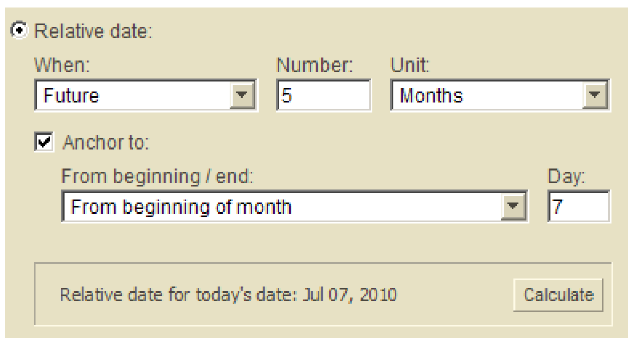
- When *Unit* = 'Weeks' – there is an *Anchor to* checkbox with a *Day* (of week) field

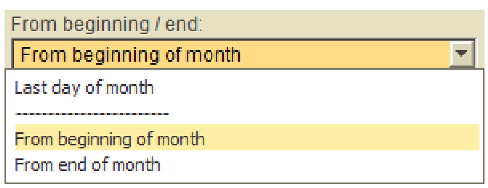


- 

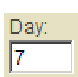
- *Day* of the week drop-down list includes the seven days of the week in order (When locale = French the week starts with Lundi=Monday).

- When *Unit* = 'Months' there is an *Anchor to* checkbox together with *From beginning/end* (of month) and *Day* (in month) fields



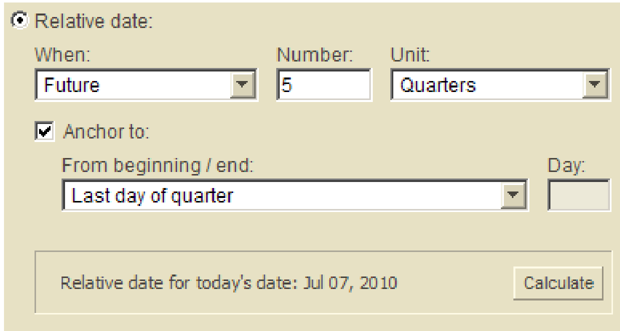
- 

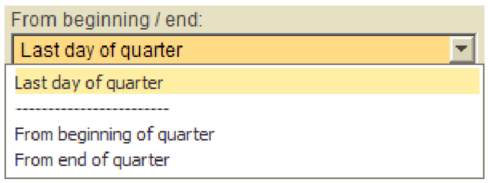
- the *From beginning/end* (of month) drop-down list includes the options; 'Last day of month', 'From beginning of month', 'From end of month' ('Last day of month' = 'From end of month with *Day* = 1.)

- 

- *Day* (in month) text entry field where any whole number from 1-31 is a valid entry. This field is disabled if *From beginning/end* = 'Last day of month'.

- When *Unit* = 'Quarters' there is an *Anchor to* checkbox together with *From beginning/end* (of quarter) and *Day* (in quarter) fields.



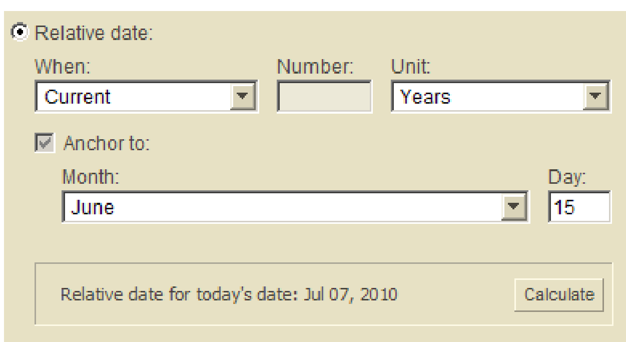
- 

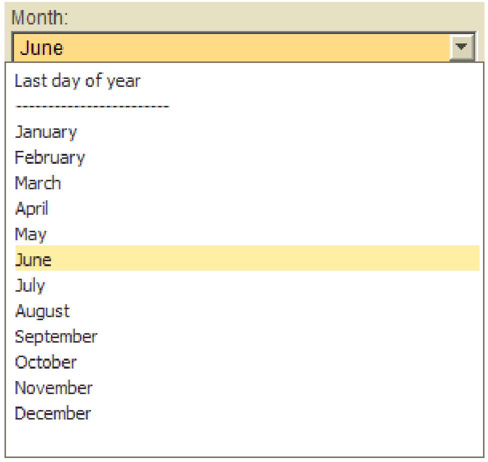
  \- the *From beginning/end* (of quarter) drop-down list includes the options; 'Last day of quarter', 'From beginning of quarter' and 'From end of quarter'. ("Last day of quarter" is the same as "From end of quarter" with "Day" = 1.)

- 

  \- *Day* (in quarter) text entry field where any whole number from 1-92 is a valid entry. This field is disabled if *From beginning/end* = 'Last day of quarter'.

- When *Unit* = "*Years*" there is an *Anchor to* checkbox together with *Month* and *Day* (from beginning of month) fields.

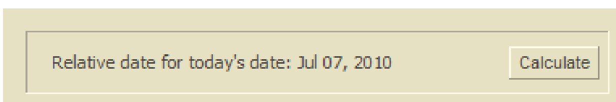


- 

- the *Month* drop-down list includes 'Last day of year' (the same as *Month* = 'December' and *Day* = 31) and the 12 months of the year in order.

- 

- "Day" of the Month text entry field

e. 

- Pressing

calculates the relative date. This is how the relative date is calculated:

~ First, based on the values of the *When*, *Number* and *Unit* fields respectively, a specific date relative to today's date is calculated.

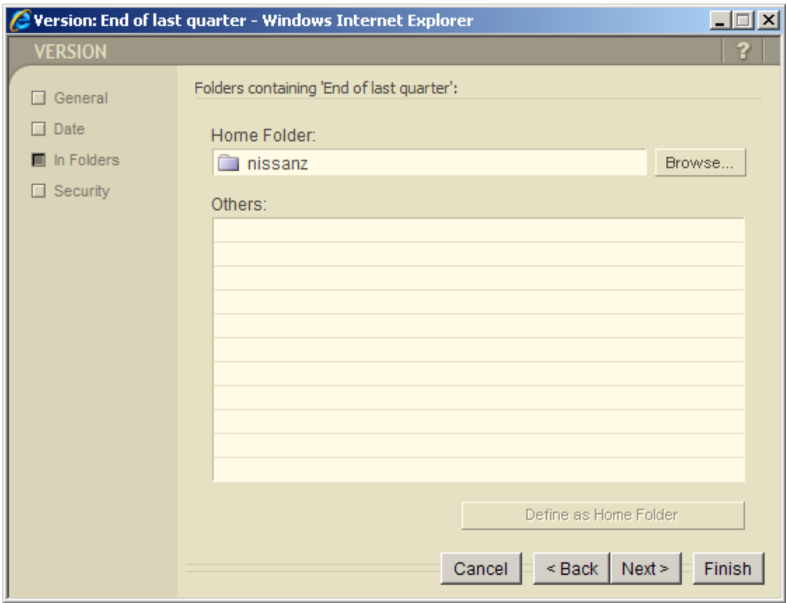
~ Depending on the unit selected, this falls within a specific week, month, quarter or year.

~ The *Anchor to* field(s) are then calculated to determine the specific day within the specific week, month, quarter or year this date will occur.

~ Depending on today's day, the Anchor to field(s) may either extend or shorten the initial calculation. (e.g., If it is Wednesday today, and a relative period of '5 weeks in the past' is defined, if Anchor day = Monday, the relative period will be extended by 2 days, if the Anchor day is Friday, the relative period will be shortened by two days.)

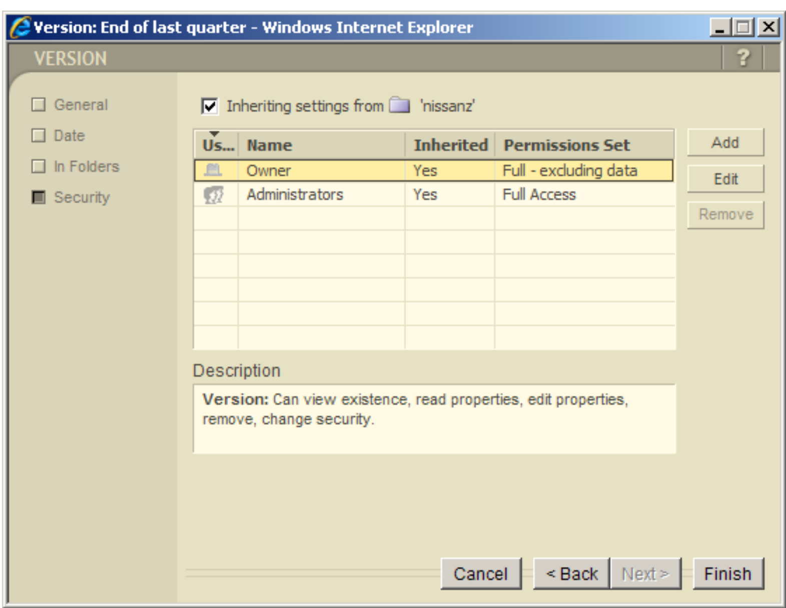
C. In Folders step

The *Version* wizard's *In Folders* step has standard Primavera Portfolio Management wizard functionality.



D. Security step

The *Version* wizard's *Security* step has standard Primavera Portfolio Management wizard functionality.

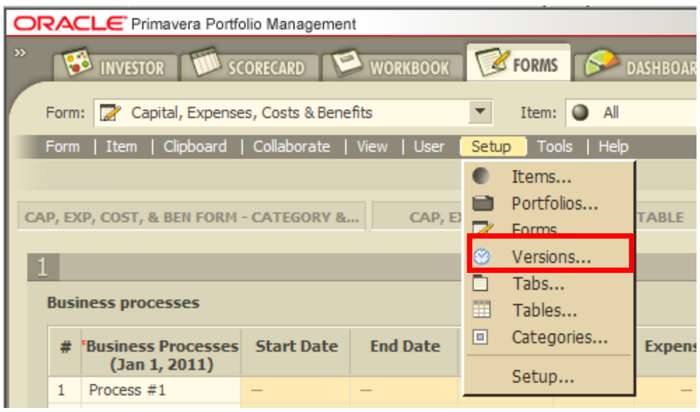


Setup module

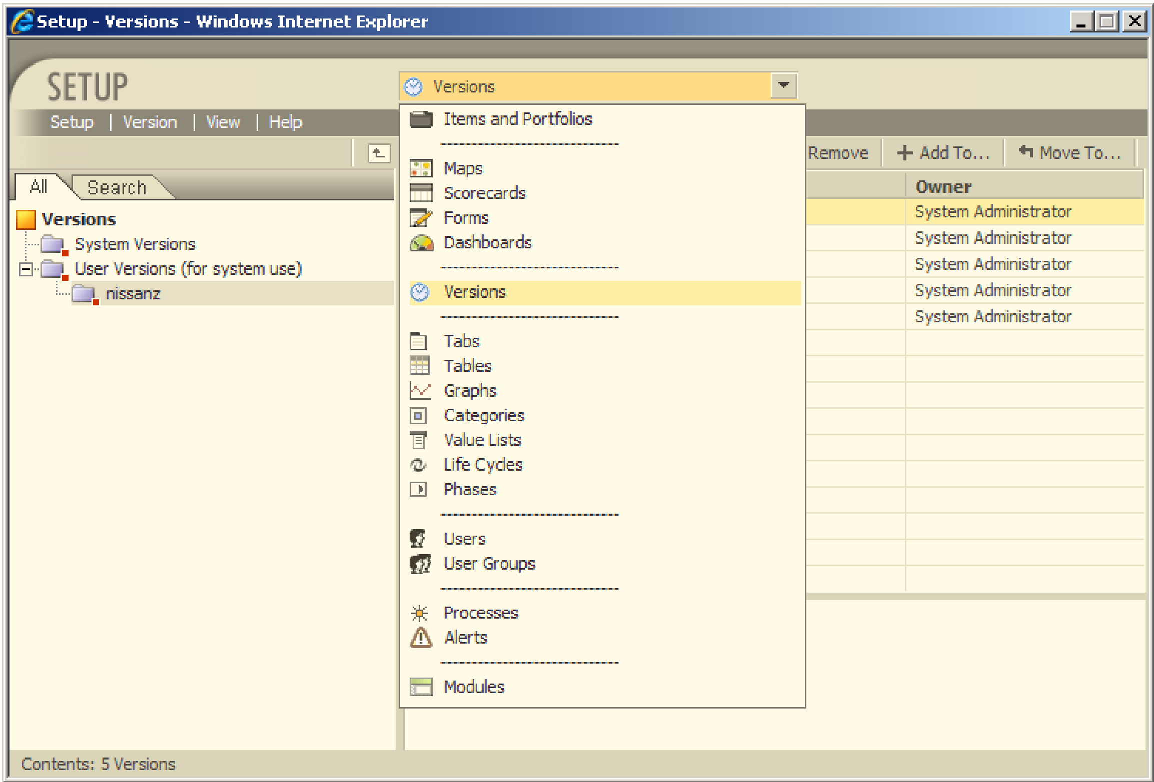
This section describes unique additions to the Setup module in Primavera Portfolios Management due to the introduction of versioning.

A. Access from the module menu bar

Versions are accessible from the menu bar in the Investor Map, Scorecard, Forms and Dashboards modules, via the "Setup" dropdown list. Navigation from here will open the Setup module, with the Versions list pre-selected.



B. Setup module



Versions are selectable from the Setup module's main drop-down menu. Note the Versions home folder icon - 

C. Usage Report, accessed from the version menu, opens a Version Usage Report, listing all instances of a given version's usage in the following objects:

1. Investor Map – for versions defined in the *Data as of* field of the Map
2. Scorecard – for versions defined in the *Data as* of field of any category
3. Tab - for versions defined in the Tab/Components step *Data as* of field for any Category, Cat. (text area) or Graph (Trend, Distribution or Scatter) components
4. Tab - for versions defined in the *Sub-item as* of field in the Dynamic List dialog box
5. Tab - for versions defined in the *Source as of* or *Target as* of fields in the Transfer Tool dialog box
6. Table - for versions defined in the *Data as* of field for any Category Value, Category Indicator or Category Annotation table cell

7. Process - for versions defined in the *Data as* of field of any My Processes link

2011 (Version)	
Version Usage Report, created by System Administrator, **Feb 17, 2010**	

#		Object	Name	Usage	Context
		Map	copy	-	Map as of
1.		Scorecard	Capital, Expenses, Costs & Benefits for Form	Column	Region
2.		Tab	Capital, Expenses, Costs & Benefits for Dashboard	Group box 1 Graph (Trend)l component 1.1	Capital: indicator trend
3.		Tab	Capital, Expenses, Costs & Benefits for Dashboard	Group box 2 Graph (Distribution) component 2.1	Capital: indicator distribution
4.		Tab	Capital, Expenses, Costs & Benefits for Dashboard	Group box 3 Graph (Scatter)l component 3.1	Capital vs. Benefits
5.		Tab	Cap, Exp, Cost, & Ben Form - Dynamic List	Group box 1 Dynamic List component 1.1	Sub-item as of
6.		Tab	Cap, Exp, Cost, & Ben Form - Dynamic List	Group box 1 Transfer Tool component 1.2	Source as of
7.		Tab	Cap, Exp, Cost, & Ben Form - Dynamic List	Group box 1 Transfer Tool component 1.2	Target as of
8.		Tab	Cap, Exp, Cost, & Ben Form - Category & Cat. (text area)	Group box 1 Category component 1.2	Benefits
9.		Tab	Cap, Exp, Cost, & Ben Form - Category & Cat. (text area)	Group box 2 Category (Text area) component 2.2	Description
10.		Table	Capital, Expenses, Costs and Benefits	Row 1, Column 2	Capital
11.		Process	My Processes	-	Capital, Expenses, Costs & Benefits

D. Removal of a version

A version cannot be removed if it is in use in any other entity (except for a My Processes link). When attempting to remove a version which is in use in at least one other entity in the system from its home folder (storage), the system prompts the user to this fact. The system will prompt about the use of the version in any of the following entity types below, one entity type at a time. It will check and prompt for the use of versions in entity types lower in the list only if the version is no longer in use in entity types higher up in the list. (e.g., if a version is used in 2 scorecards and 3 tables, the prompt will first display only the list of 2 scorecards which use this version. Once the version has been removed from these two Scorecards, only then will it check for use in Tabs. Once discovering that it is not used in Tabs, for all three of its possibilities, only then will it check and prompt for Tables.)

1. Investor Map

2. Scorecard
3. Tab for Category, Cat. (text area) or Graph components
4. Tab for the Dynamic List
5. Tab for the Transfer Tool
6. Table

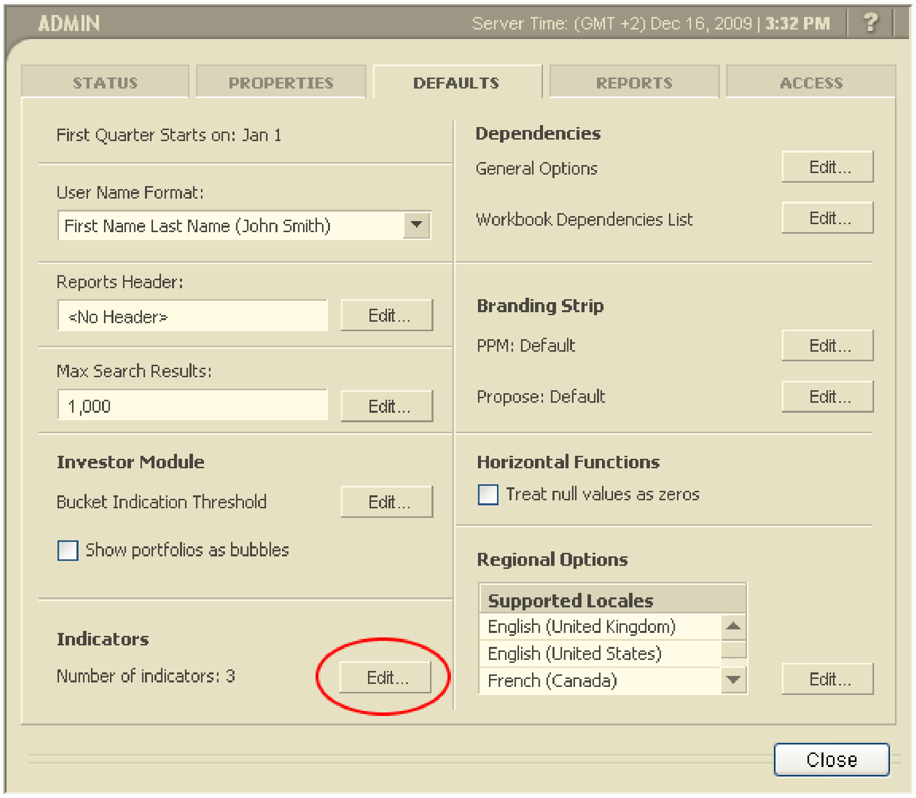
All entities of that type which use the version will be listed, except for those entities for which the user does not have security access.

Additional, Customizable Category Indicator Colors & Shapes

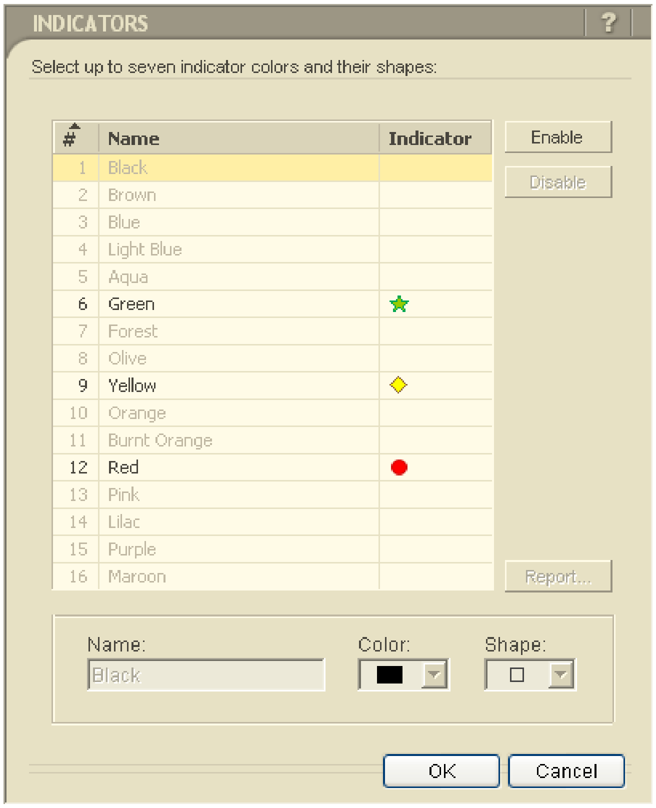
Primavera Portfolio Management 8.0 supports the customization of category indicator colors, shapes and names. Between two to seven indicator colors and shapes may be selected from a palette of 16 different colors and seven different shapes. This customized list of indicators is used in every category indicator display and input. The non-category based Life cycle Phase Health and Investor Map Gap Indication still use the non-customizable Green star, Yellow diamond and Red circle indicator scheme. Basic Indicator functions can be defined on any subset of the currently enabled set of category indicators. Reports are available to predict the affects of disabling or re-enabling indicators on all Basic and Advanced indicator functions.

Configuring Indicators

To configure the category-based indicators, a new Indicators dialog box has been developed for PPM 8.0. It is accessed from the Indicators section on the Admin/Defaults tab.



Clicking on Edit pops up the Indicators dialog box.



The initial configuration of the Indicators lists displays only 3 enabled indicators: rows 6 (Green), 9 (Yellow) and 12 (Red). All other rows are disabled.

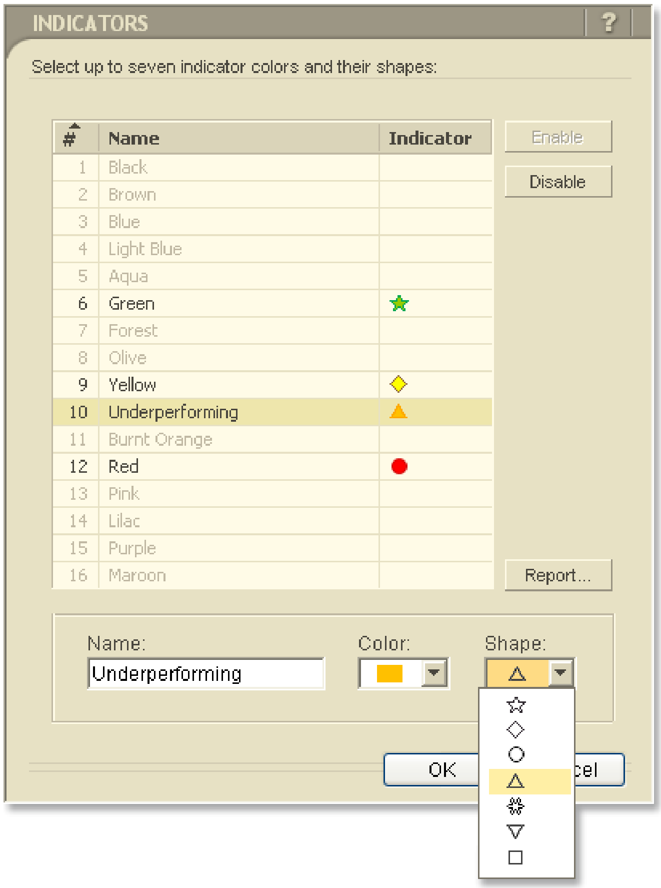
A. Select a disabled indicator in the table.

B. Click the **Enable** button to activate the indicator for use in the application. (Click the **Disable** button to stop using a currently enabled indicator.)

C. Enter a name for the indicator in the **Name** field. For example, instead of *Orange* type *Underperforming*.

D. Select one of the sixteen supported colors for the indicator from the **Color** drop-down list.

E. Select one of the seven supported shapes for the indicator from the **Shape** drop-down list.



F. Repeat steps A to D to define at least two (2) and but more than seven (7) enabled indicators.

G. **Note**: Row 9 (Yellow ◇) can be renamed and have its shape and color changed, but it cannot be disabled.

H. Verify that:

1. All 16 indicators, whether disabled or not, are uniquely named.
2. The color-shape combinations of each of the enabled indicators is unique

I. (Optional) Click **Report...** to generate and view a report detailing the impact of your selections on Basic and Advanced Indicator Functions. For example, the default red circle indicator will likely be used in numerous categories. If you have it set to be disabled, the *Indicator Functions with Indicators about to be Disabled/Re-enabled* report will show you the functions that displayed it and will also show you how the system will interpret future results using other indicators while it is disabled.

Indicator Functions with Indicators about to be Disabled/Re-enabled

By Administrator, System, **Jan 04, 2010**

[Blue (Re-enabled)](#)
[Olive (Re-enabled)](#)
[Orange (Re-enabled)](#)
[Burnt Orange (Disabled - default value: Yellow)](#)

Blue (Re-enabled)

#		Object	Name	Function Description	Indicator / Summary	Function Type	Interpreted as

Olive (Re-enabled)

#		Object	Name	Function Description	Indicator / Summary	Function Type	Interpreted as
1.	⊡	Category	cat <asd 123		Indicator	Basic	Re-enabled

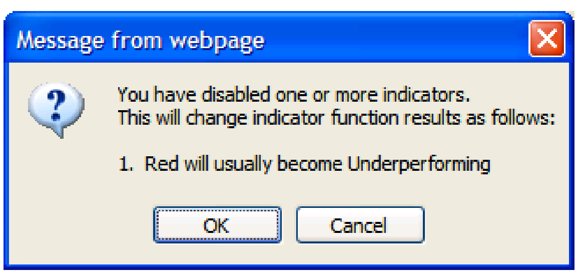
Orange (Re-enabled)

#		Object	Name	Function Description	Indicator / Summary	Function Type	Interpreted as

Burnt Orange (Disabled - default value: Yellow)

#		Object	Name	Function Description	Indicator / Summary	Function Type	Interpreted as
1.	⊡	Category	no 9 pivot ind basic	undefined	Summary Indicator	Basic	[Show Indicator]
2.	⊡	Category	5 ind basic diff	undefined	Indicator	Basic	Default: Yellow
3.	⊡	Category	5 ind basic diff	undefined	Summary Indicator	Basic	[Show Indicator]
4.	⊡	Category	6 ind basic	undefined	Indicator	Basic	Default: Yellow
5.	⊡	Category	4 ind basic	undefined	Indicator	Basic	[Show Indicator]

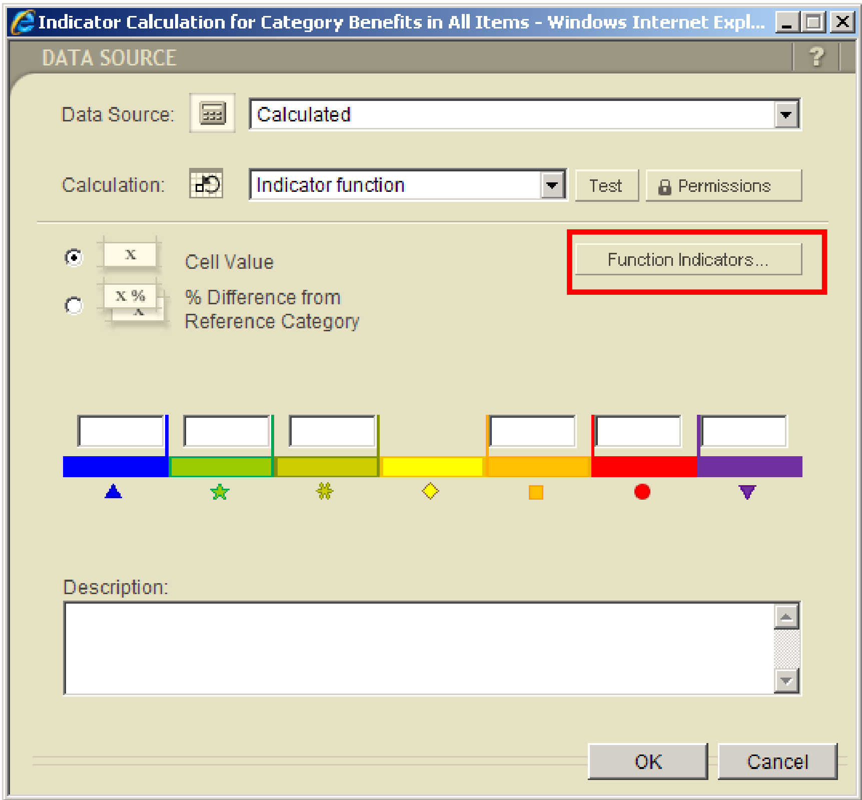
J. Click **OK** when finished. If you have disabled or re-enabled any indicator message boxes will appear to notify you of their potential affect on indicator function results.



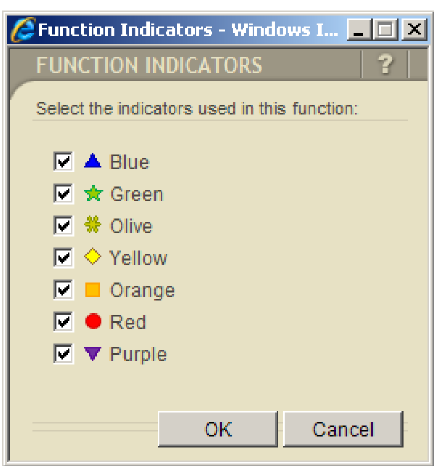
Basic Indicator Functions

Both Cell Value and % Difference form Reference Category Basic Indicator Functions can now be defined on any sub-set of the currently enabled indicators.

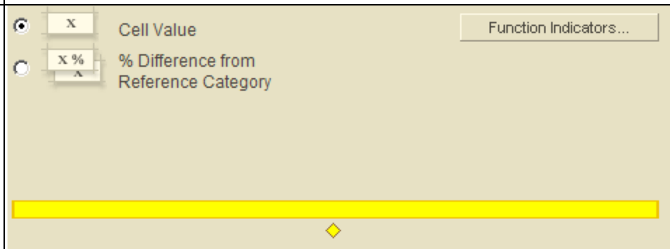
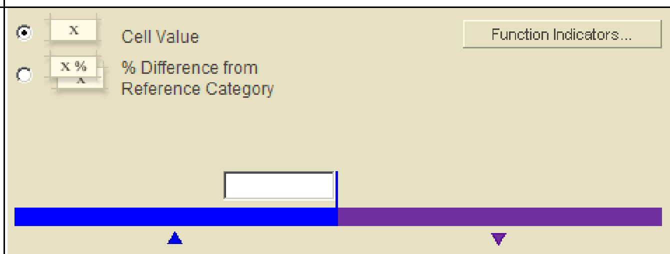
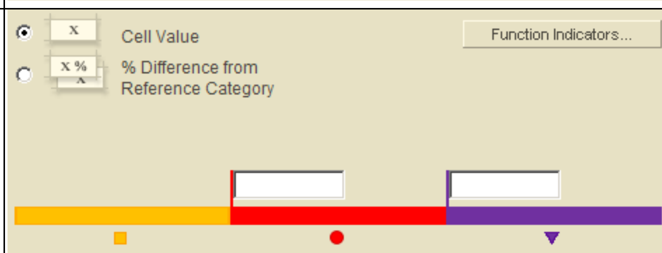
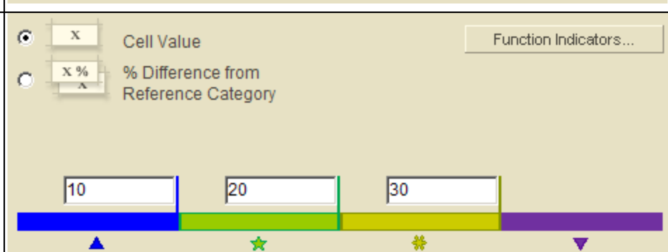
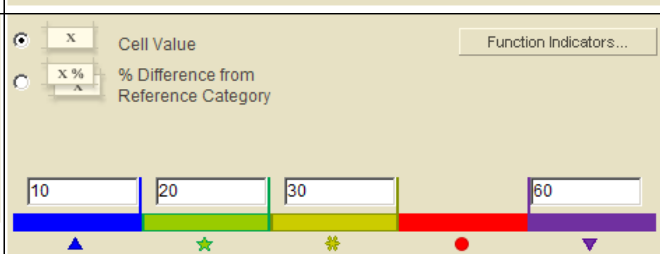
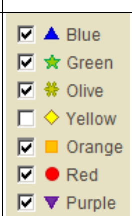
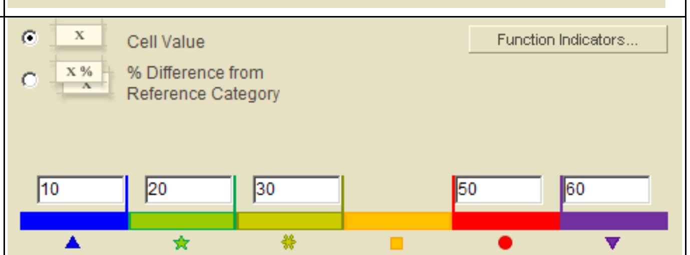
A. Cell Value Indicator Functions

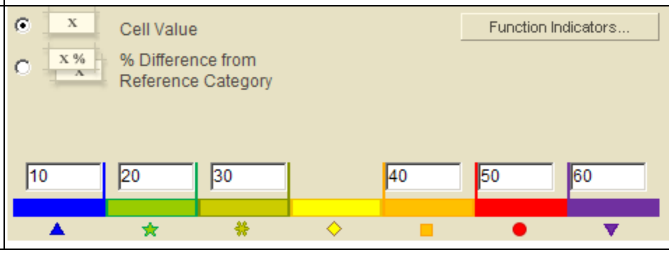


Click on the **Function Indicators** button to pop-up the Function Indicators dialog box. Check off the indicators you wish to use in the function.

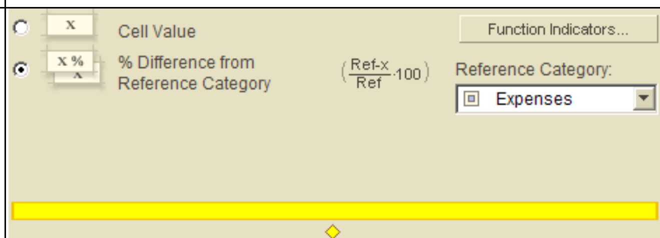
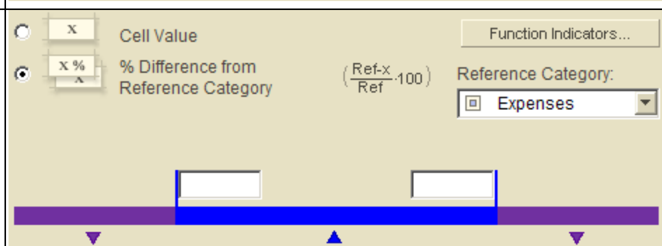
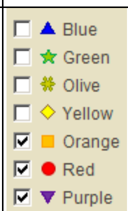
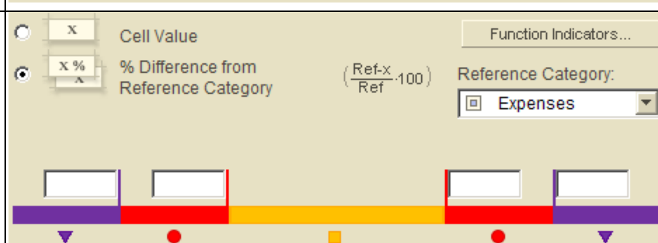
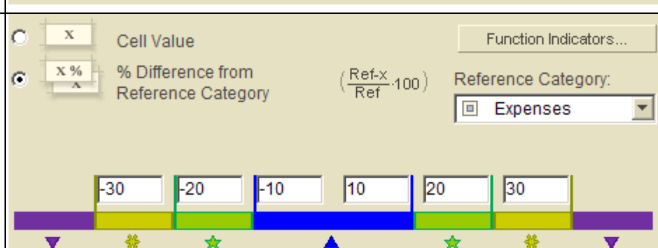


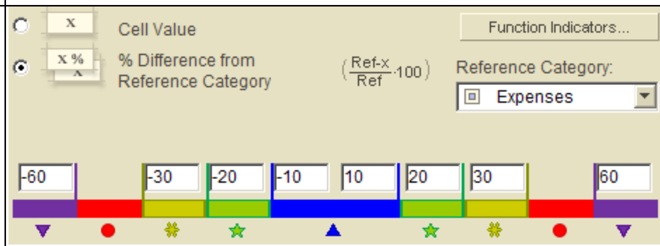
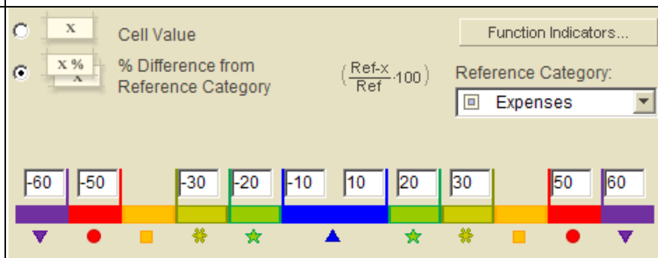
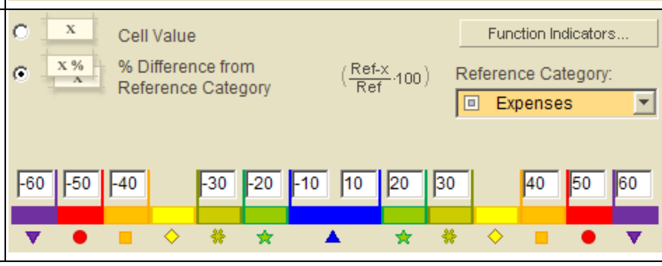
The table below shows the graphical representation of the Cell Value basic indicator function for different subsets of the currently enabled indicators. Note: the changing direction and values of the flag fields above each Indicator color.

<table>
<tr><th></th><th>Function Indicators</th><th>Graphical Representation of Cell Value Indicator Function</th></tr>
<tr><td>a.</td><td>
</td><td>
</td></tr>
<tr><td>b.</td><td>
</td><td>
</td></tr>
<tr><td>c.</td><td>
</td><td>
</td></tr>
<tr><td>d.</td><td>
</td><td>
</td></tr>
<tr><td>e.</td><td>
</td><td>
</td></tr>
<tr><td>f.</td><td>
</td><td>
</td></tr>
</table>

	Function Indicators	Graphical Representation of Cell Value Indicator Function
g.		

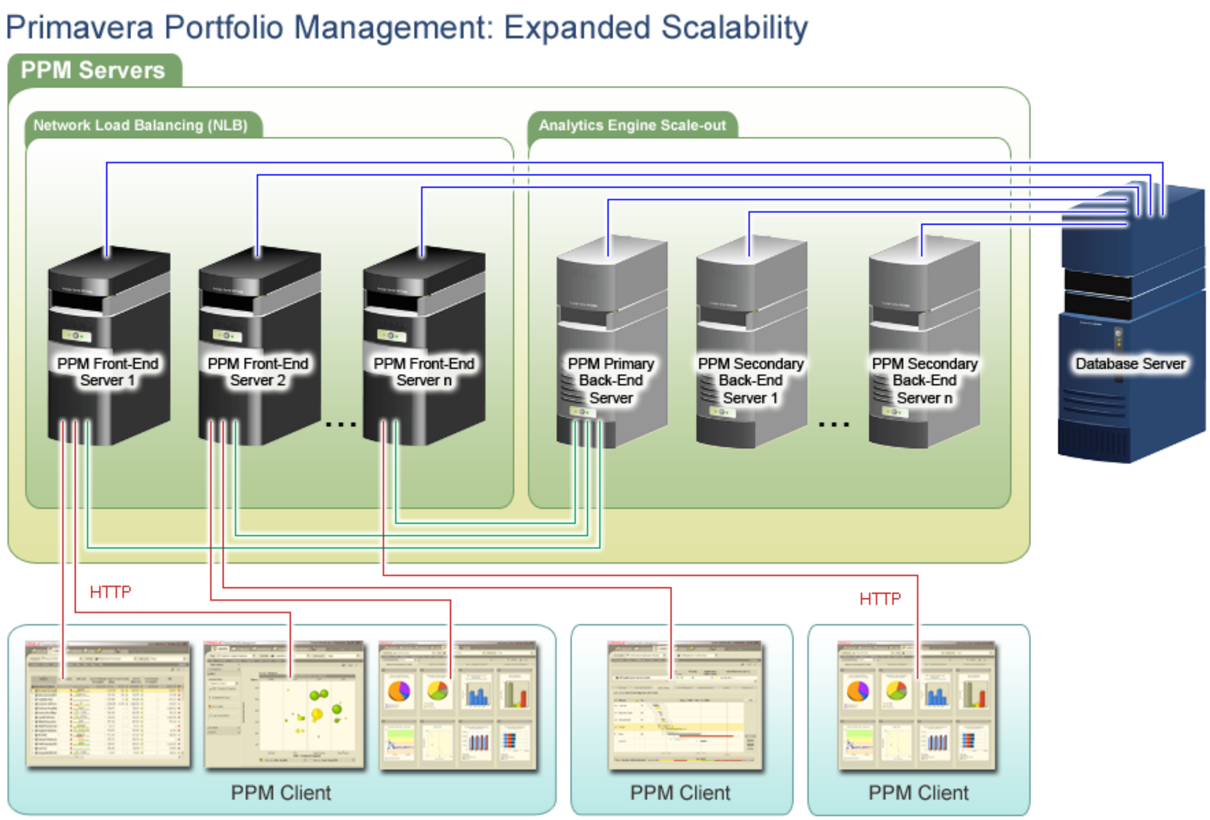
The table below shows the graphical representation of the % Difference from Reference Category basic indicator function for different subsets of the currently enabled indicators. Note: the changing direction and values of the flag fields above each Indicator color.

	Function Indicators	Graphical Representation of % Difference from Reference Category Indicator Function
1.		
2.		
3.		
4.		

	Function Indicators	Graphical Representation of % Difference from Reference Category Indicator Function
5.		
6.		
7.		

Function Engine Scale-out

The Primavera Portfolio Management analytics engine can now be hosted on multiple PPM back-end servers. This combined with the fact that the PPM application is already hosted on multiple Front-End servers in a Network Load Balancing (NLB) environment means that PPM supports true transaction-based load balancing (no “sticky session”).



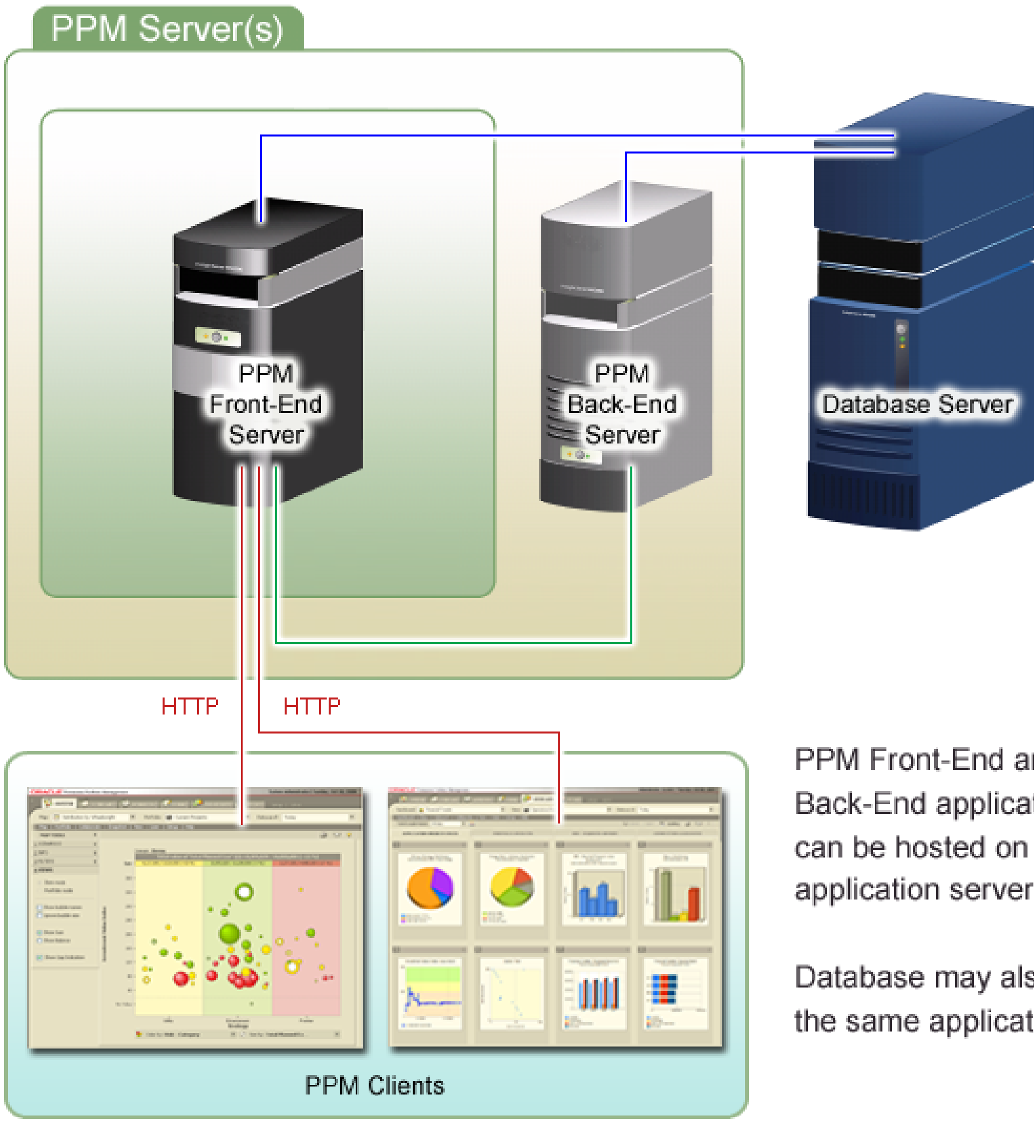
Depending on the number of users and the volume of activity, PPM can be installed in three different basic configurations (with different flavors of each):

A. No scalability - The PPM Front-End application, PPM Back-End application and Database all reside on the same server.

B. Simple scalability - The PPM Front-End application, PPM Back-End application and Database each resides on its own single server.

C. Expanded scalability - The PPM Front-End application and/or the PPM Back-End application each may resides on their own multiple application servers, while the Database resides on a its own single server.

Primavera Portfolio Management: Simple Scalability

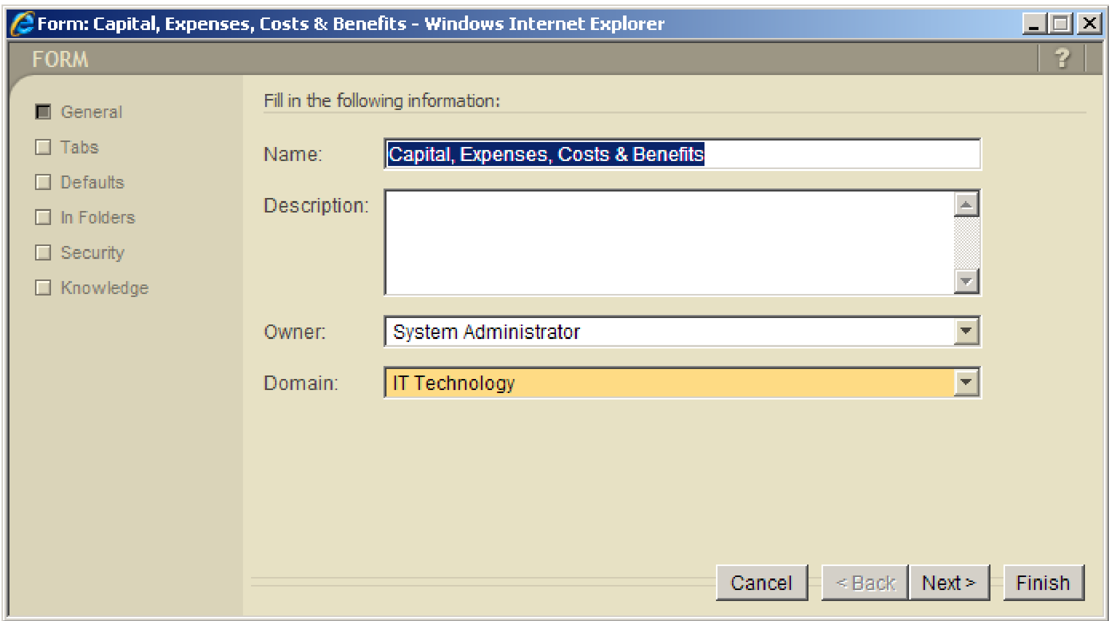


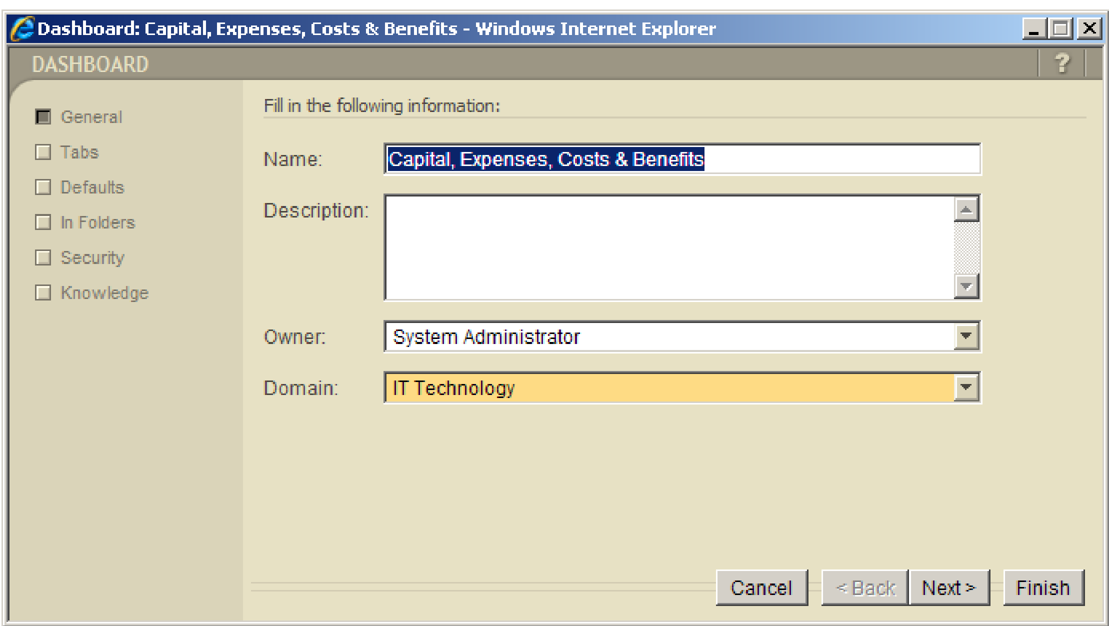
PPM Front-End and PPM Back-End application servers can be hosted on the same application server.

Database may also reside on the same application server.

Domain-sensitive Form/Dashboard Navigation & Selection

Forms and Dashboards can now be linked to a specific domain, and be selected only when Items or Portfolios of that same domain (or of no particular domain) are being viewed.



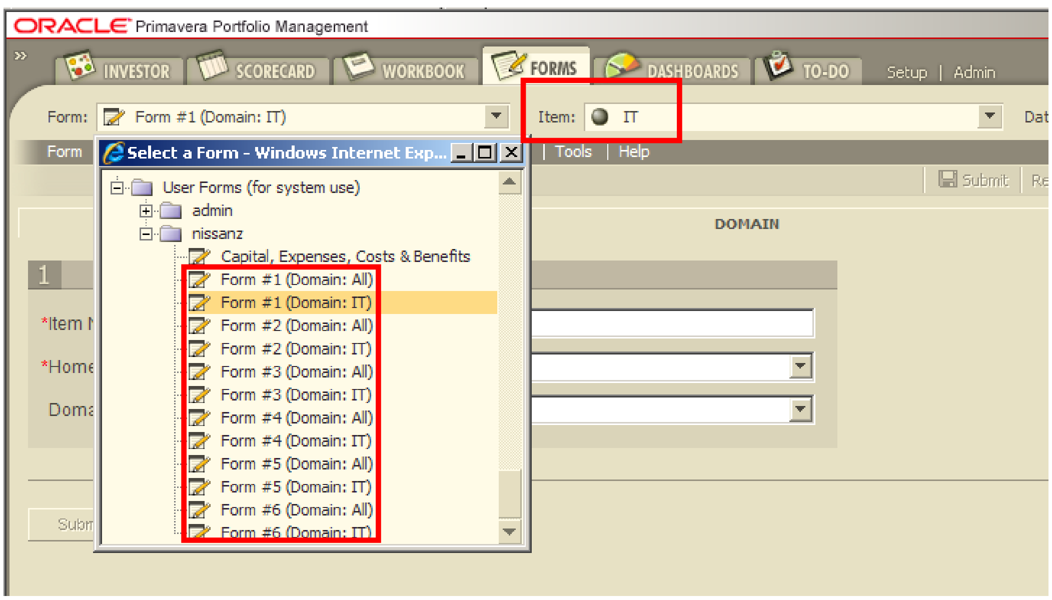


A. Each Form/Dashboard can be assigned either a specific domain or 'All Domains' via a *Domain* field on the General step of the Forms and Dashboard wizards. (The 'All Domains' value in this wizard field is equivalent to the 'No Domains' value in the System Category: Domain.) The default for all new and pre PPM 8.0 forms and dashboards is 'All Domains'.

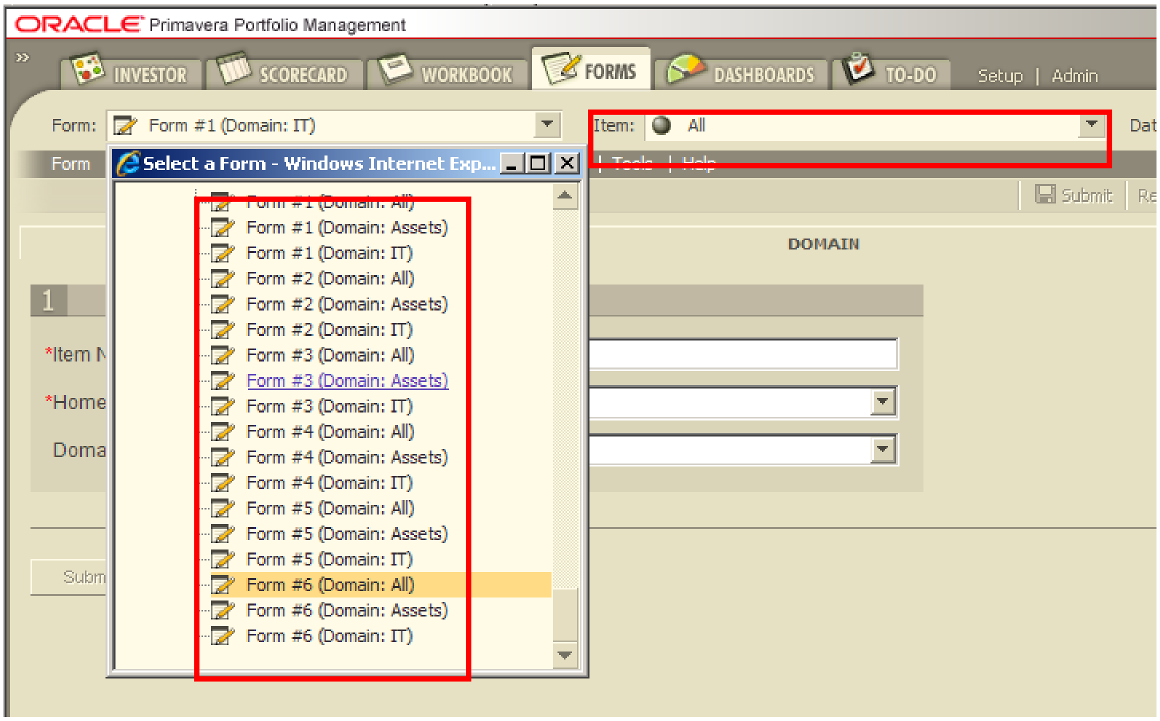
B. Each Item/Portfolio can also be assigned a domain on a Scorecard or Form via the System Category 'Domain'. Default: No Value

C. When accessing a Form/Dashboard from its Module tab tree, only those matching the domain of the currently displayed Item or Portfolio will be available in the Select a Form pop-up list, as follows:

1. If the Item/Portfolio is assigned a specific domain then only those Forms/Dashboards assigned the same specific domain or 'All Domains' will be available. In the picture below the item's domain = 'IT'. The only available forms are those whose domain = 'IT' or 'All'.



2. If the Item/Portfolio is assigned 'No Domain' then all Forms/Dashboards whether assigned a specific domain or 'All Domains' will be available. In the picture below the item's domain = 'All'. All forms are available regardless of their domain.



D. The “Recents” list in the Select a Form/Dashboard pop-list will include any of the last five Forms/Dashboards that were accessed, whose domain either matches the currently displayed domain or is ‘All Domains’.

E. Switching to an Item/Portfolio assigned a different specific domain removes the current Form/Dashboard and displays <Select a Form>. Switching to an Item assigned to No Domain will keep the current Form/Dashboard but its “Recents” list and Select a Form/Dashboard pop-up list will reflect ‘All Domains’.

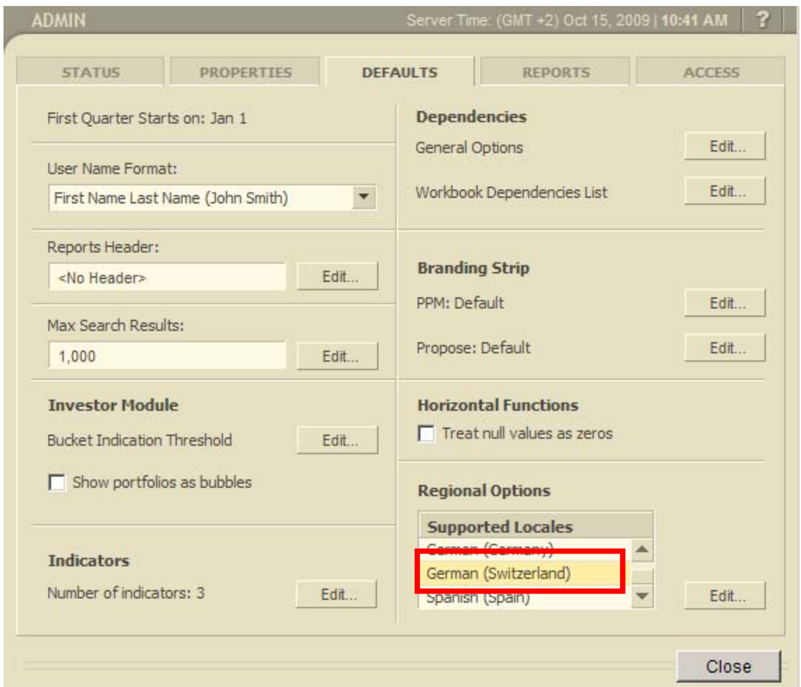
F. The domain of an Item/Potfolio is determined by its current value and not by its Domain as of the date displayed in the *Data as of* control

1. This means that even if an item belonged to the domain 'Prospect' in 2007 which switches to domain 'Customer' in 2008 (which remains his domain until today), then whether the *Data as of* control is set to 2007 or 2008, the available forms will be 'Customer' forms; (which is the current domain of item)

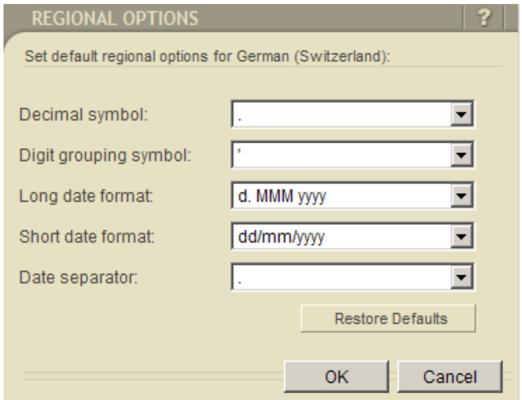
Regional Support for German (Switzerland) Locale

Regional support for German (Switzerland) has been added to Primavera Portfolio Management 8.0. This means that the decimal and digit grouping symbols, long and short date formats and date separator reflecting German (Switzerland) usage can be defined for the system on the administrative level, and then be subsequently selected by an end-user.

G. Defining Regional support for German (Switzerland)



In the *Defaults* tab of the *Admin* dialog box select the *German (Switzerland)* regional option and click the *Edit...* button. This accesses the *Regional Options* dialog box for defining the German (Switzerland) regional options, shown below. Each of the five different regional options for German (Switzerland) can either be defined independently, or the factory defaults for all of the options can be restored. These regional options apply to the entire Primavera Portfolios Management installation.



H. Selecting the German (Switzerland)Regional Options

The German (Switzerland) regional options can be selected by the end-user via the *My Locale* drop-down from the *Preferences* step in the *User* wizard. This step is accessed via the *User Preferences* option in the *User* menu.

Enhancements

Investor Map Upgrade

The Investor Map has been completely re-written without Java thereby eliminating the need for Java to be installed on the client workstation. As part of this re-write, all of the Scenario (formerly Version) management tools, data Info display per Item, Filtering and Viewing functionality have been re-organized in an accordion-style control called Map Tools. Separate regions in the map have been delineated for Items whose X-axis and Y-axis have No Value. Similarly Items whose Size by categories have a negative value or No Value, are displayed distinctly from those who have positive values for this category. The "smart scatter" of bubbles whose X-axis or Y-axis value list values are identical, can now be neutralized, so that these bubbles will be aligned along the same line. This is all in addition to the aforementioned Versioning and Customizable Indicator support which has been added here as in the other modules.

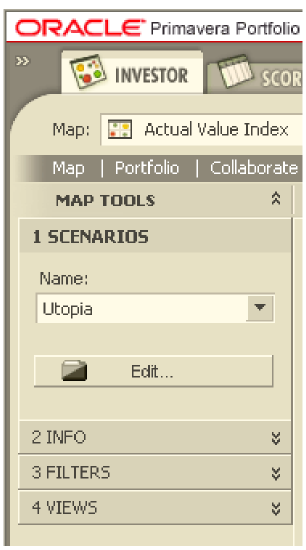
A. No need for Java on the client workstation

Java has been removed from the entire program; both from the Investor Map module and from the Investor Map wizard.

B. Map Tools

You can customize your investor map with the **Map Tools** set of panels described in the following sections. All the tools presented are optional.

1. Map Tools: Scenarios Panel
   a. In the **Investor Map** module, click **Map Tools** to show the set of panels.
   b. Click the **Scenarios** bar to expand the *Scenarios* panel.



   c. In the **Name** field, from the drop-down list, select an existing scenario, *< No Scenario >*, or *< New Scenario >*.

   Note: The total number of defined portfolio scenarios appears at the bottom of the drop-down list.

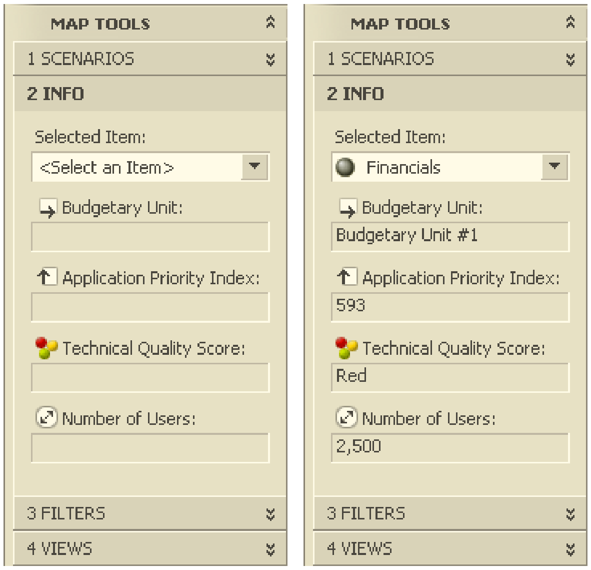
   If you select a scenario, the *What-If* mode appears.

   d. Click **Edit** to modify the current scenario.

2. Map Tools: Information Panel

   a. In the *Investor Map* module, click **Map Tools** to show the set of panels.

   b. Click the **Info** bar to expand the *Information* panel.



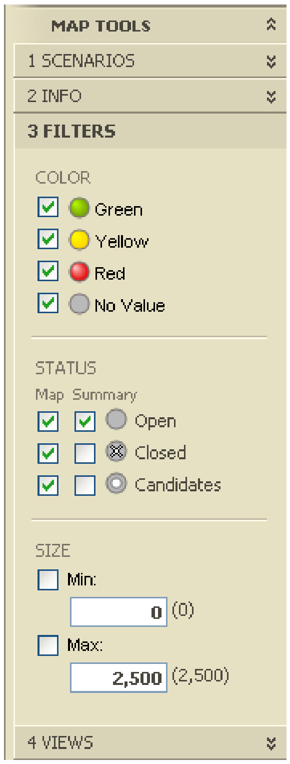
   c. If you have previously selected an item in another module, then the Information panel will display the item's axes category data. You can change the selection from the drop-down list.

   Note: The total number of items shown on the map appears at the bottom of the drop-down list.

3. Map Tools: Filters Panel

   a. In the Investor Map module, click Map Tools to show the set of panels.

   b. Click the **Filters** bar to expand the Filters panel.



   c. In the **Color** section, check the indicator colors you want to include in the map.

   d. In the **Status** section**,** there are two sets of check boxes: **Map** and **Summary**. Check the **Map** boxes for the status values you want to show on the map. Check the **Summary** boxes for the status values you want to include in the summary calculations for map. Statuses include *Open*, *Closed*, or *Candidates*.

      ~ **Note:** When the Investor map is in *Scenario* mode, two additional status filters are available: **Added** and **Removed**.

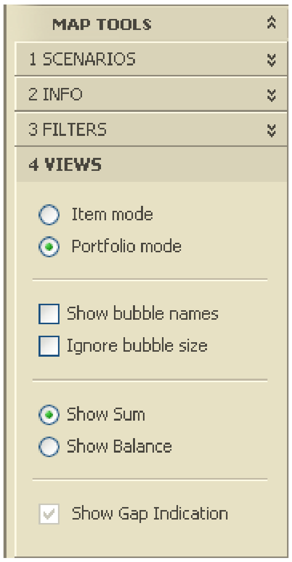
      ~ **Note**: By default, only *Open* items are included in the summary calculations used for the investor map. When you apply a scenario, the open and added item statuses are included in the summary calculations by default.

   e. In the Size section, check **Min**, **Max**, or both boxes to filter the map based on size specified by a minimum value, maximum value, or range of values for the number of items in the portfolio. The numbers shown in parentheses to the right of the **Min** and **Max** fields indicate the actual range of items shown in the map.

4. Map Tools: Views Panel

   a. In the Investor Map module, click Map Tools to show the set of panels.

   b. Click the **Views** bar to expand the Views panel.

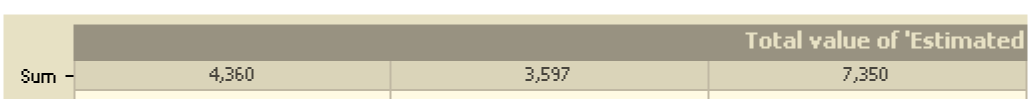


   c. Select either item or portfolio mode. Item mode shows all items included in the entire hierarchy of the selected portfolio. Portfolio mode shows only the first level portfolios included in the selected portfolio. When a portfolio of items is selected, the Portfolio mode is disabled.

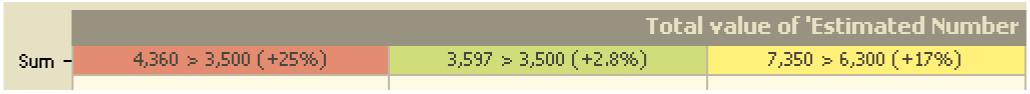
   d. Check **Show bubble names** to show a label for each bubble in the map. Check **Ignore bubble size** to display each item or portfolio in the same size instead of sizes based on data of the size axis category.

   e. Select **Show Sum** or **Show Balance** to switch between viewing the strategic bucket information in terms of the sum or balance, as described below.

      ~ **Sum:** Sum is the total value of the bucket's size axes.

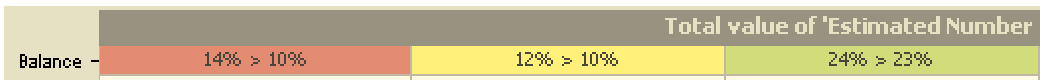


When goals are entered for the portfolio or scenario, the Title Bars also shows the actual values next to the bucket goals, with the percentage of deviation in parentheses. The background colors of the title bars are indication, based on the defined gap between the actual values and the goals.

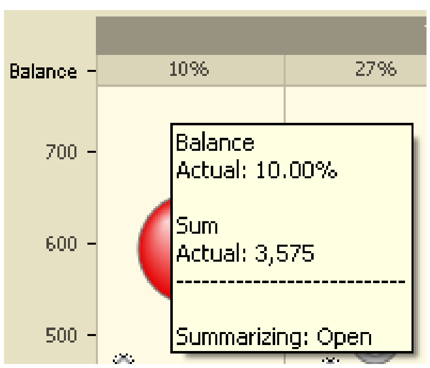


~ **Balance:** Balance is the percent of a bucket's summary in relation to the entire portfolio summary.

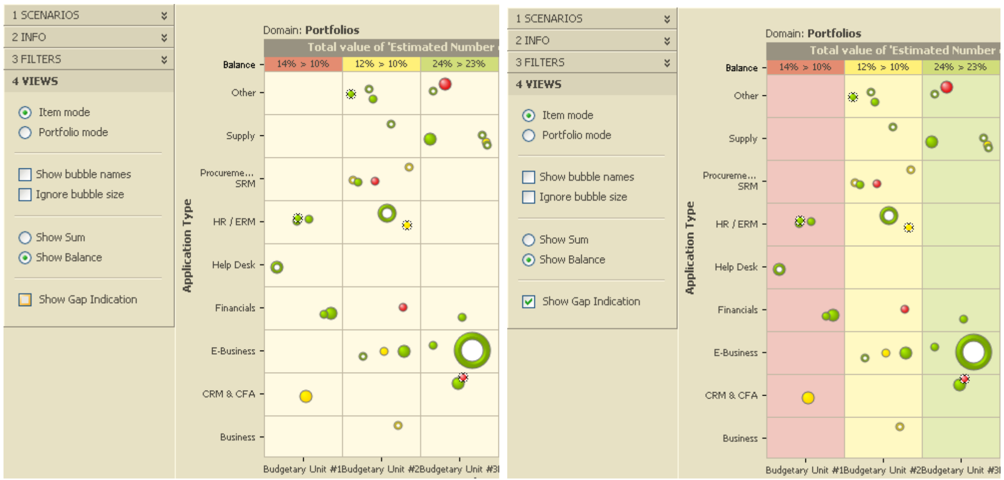
When goals are entered for the portfolio or scenario, the title bars also shows the percent of the actual values next to the percent of the bucket goals. The background colors are the same as when showing Sums.



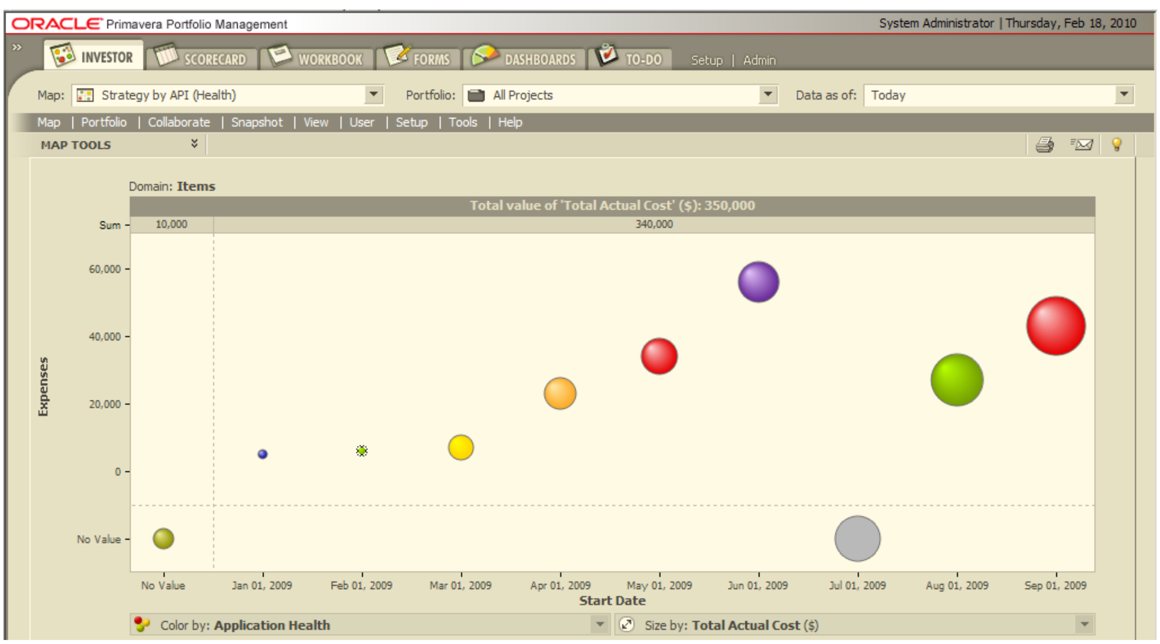
- **Note:** To view a tool tip for an individual bucket, mouse over the bucket's Title Bar. The tool tip displays the bucket's sum and balance, and a summary of item status filters.



f. If the **Show Gap Indication** check box is not checked, the indicator background colors are shown only in the Title Bars. Check the box to show indicator backgrounds on entire buckets.



C. Special Regions for Bubbles/Folders whose X-axis and Y-axis categories have No value



When Items/Portfolios in the Investor Map have *No Value* for the X-axis and/or Y-axis categories, a corresponding *No Value* region is displayed. This is regardless of whether these categories are of value type float, integer, date or value list:

1. If there is at least one Item/Portfolio whose X-axis value = 'No Value', then a *No Value* region appears on the left side of the map, extending from the Y-axis halfway to the lowest value tick mark on the X-axis.

a. This tick mark is labeled beneath it *No Value*

b. All Items/Portfolios whose value for the X-axis category = 'No Value' will appear in this region.

c. Once all Items/Portfolios have values for the X-axis category, this region will disappear.

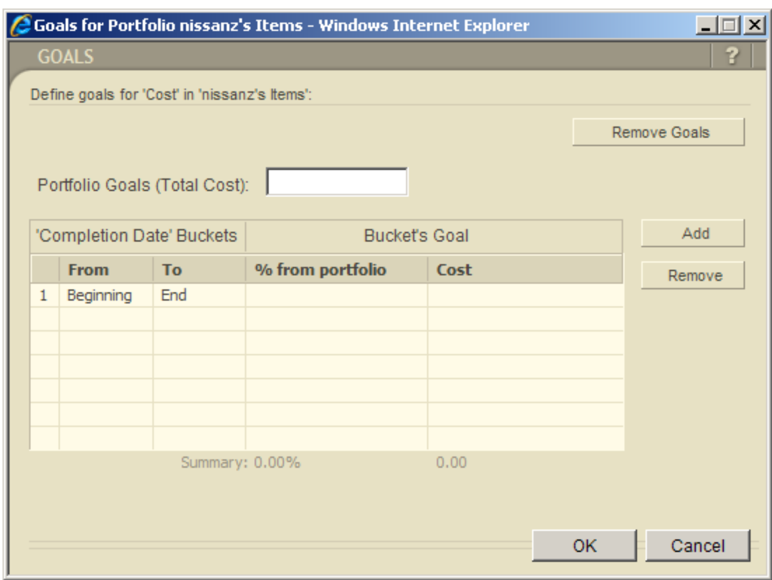
2. If there is at least one Item/Portfolio whose Y-axis value = 'No Value', then a No Value region appears on the bottom of the map, extending from the X-axis halfway up to the lowest value tick mark on the Y-axis.

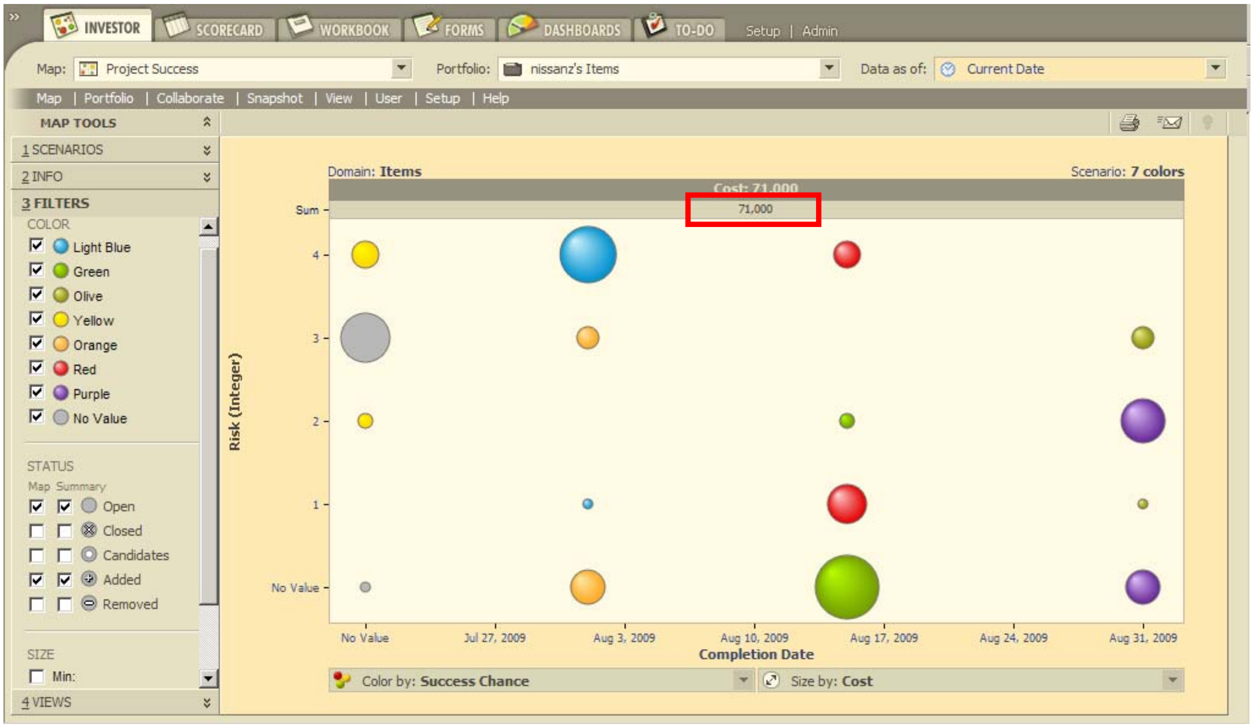
   a. The tick mark to the left of this region is labeled 'No Value'

   b. All Items/Portfolios whose value for the Y-axis category = 'No Value' will appear in this region.

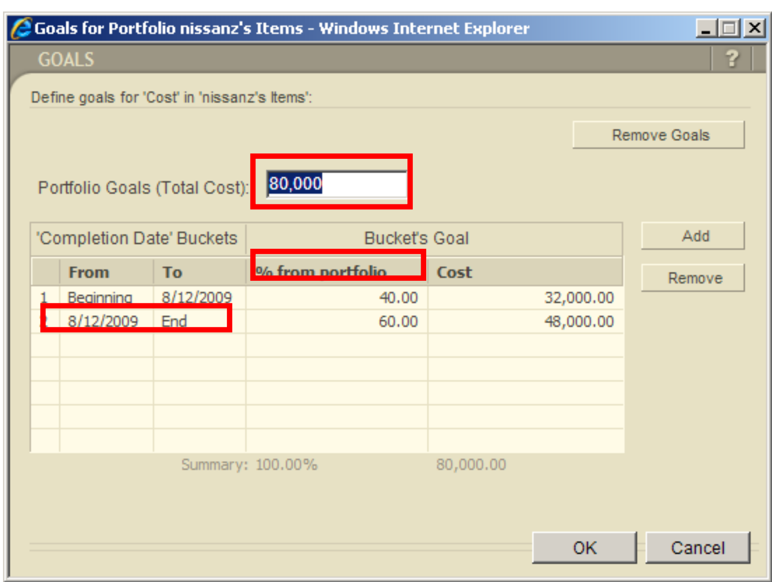
   c. Once all Items/Portfolios have values for the Y-axis category, this region will disappear..

3. If none of the parameters have been defined in the Goals dialog box, and there are Items whose X-axis category = 'No Value', then the No value region be included in the Sum and Balance of the Actual values of all of the other items in the Portfolio, as shown below:

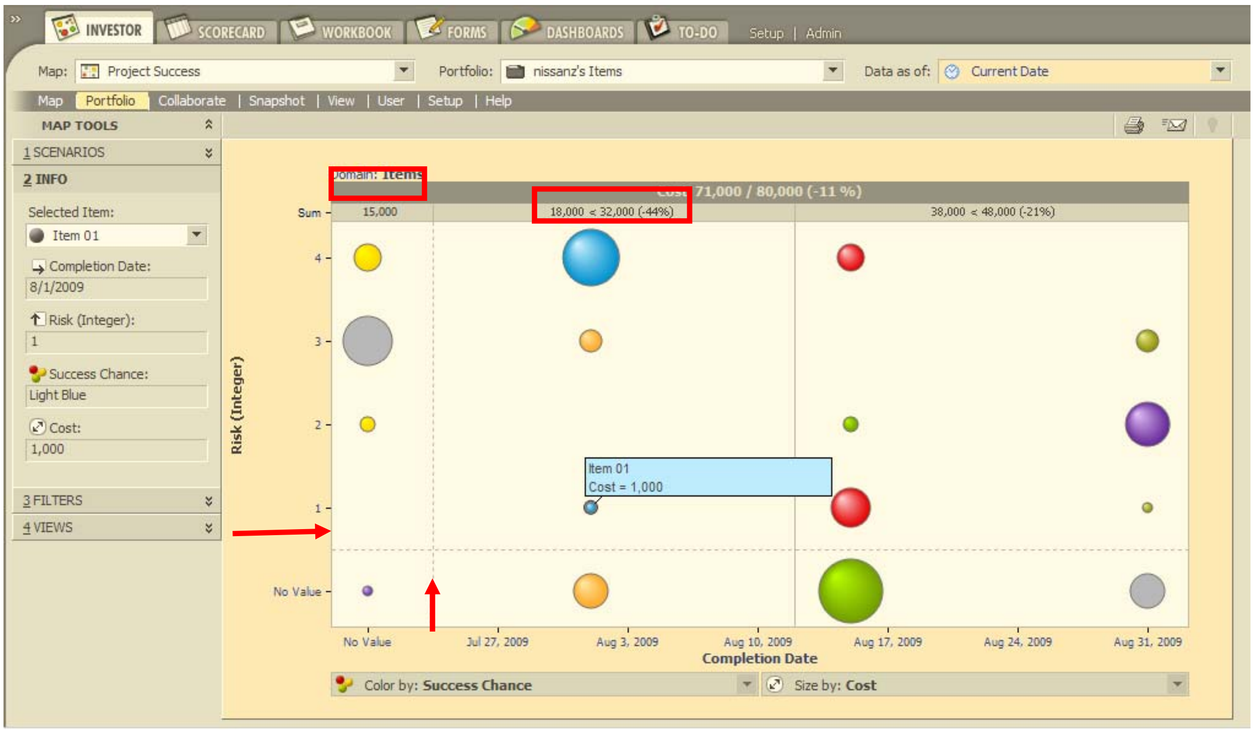




4. If one or more of the following goal parameters has been defined:
   a. The portfolio goal has been defined in the Goals dialog box
   b. The **Beginning** to **End** bucket has been assigned a percentage goal of the entire portfolio in the Goals dialog box
   c. An additional bucket has been added to the original **Beginning** to **End** bucket either in the Goals dialog box or interactively via the Split Range option.



5. If there are items with No Value for the X-axis category then
   a. A No Value region will be delineated by a dashed line parallel to the Y-axis, extending through the Bucket Sum/Balance bar.
   b. The Sum and Balance of the Actual values of these Items will ***NO LONGER*** be included in the Sum and Balance of the other Items in the portfolios. (Since goals are not defined for the No Value region, only actual values and not goal values will be displayed.)
6. If there are items with No Value for the Y-axis category, then a No Value region will be delineated by a dashed line parallel to the X-axis.



7. The No Value for X-axis region cannot be split either interactively or via the Goals dialog box.
8. Generally speaking, the bubbles/folders representing the Items/Portfolios with *No Value* for the X-axis category, should be treated the same as any other bubble/folder, as follows:
   a. **Summary line** - included on the top for the total size-by category
   b. **Bucket Sum/Balance** - When not in Bucket mode they should be summed and balanced with the rest of the portfolio. When in Bucket Mode, they show ***ACTUALS*** but no bucket goal sums or balances (e.g. 575,000).
   c. **Scenarios** – Theses items are included in the scenarios dialog box, as are all other items.

d. **Info** - Theses items are included in the Info selected Item list with their category values as are all other items.

e. **Filters** – These Items are controlled by all of the filtering functionality as are all other items.

f. **Views**

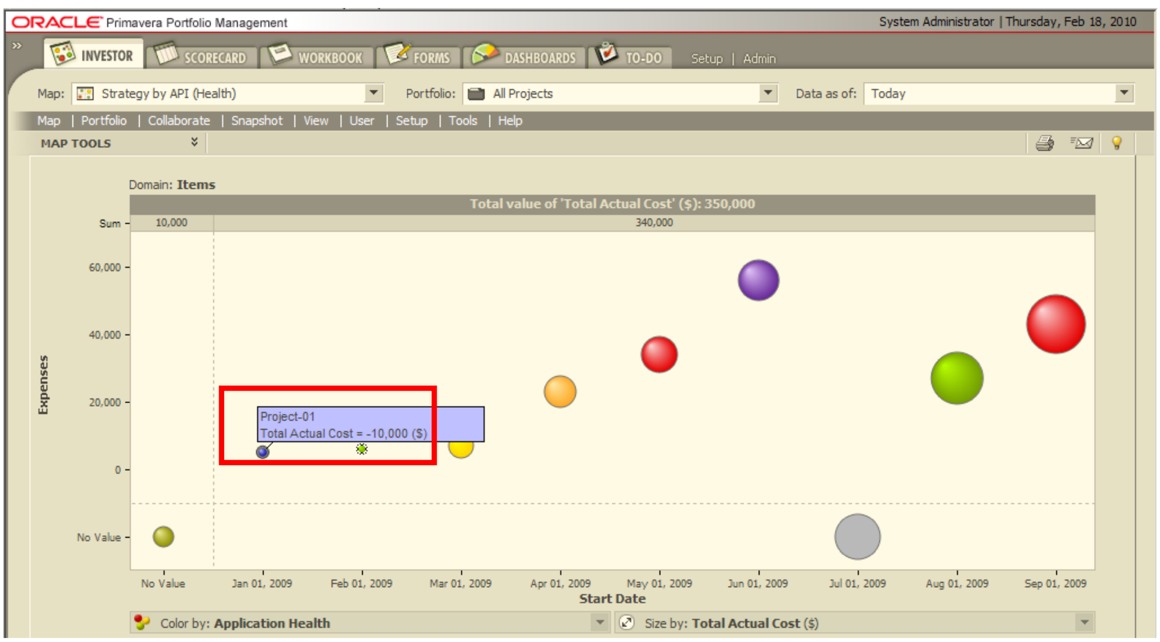
~ Item/Portfolio mode = same

~ Bubble Names & Sizes = same

~ Show Sum/Balance shows only ***ACTUALS*** when No Value region is delineated by the dashed line. When not in Bucket mode the No Value items are included within Sum and Balance of all of the other items in the Portfolio.

g. Show Gap Indications: will not affect this column or its header, since it is not defined in the Goals dialog.

D. Correct representation of Bubbles/Folder whose Size by category is No Value or a negative value



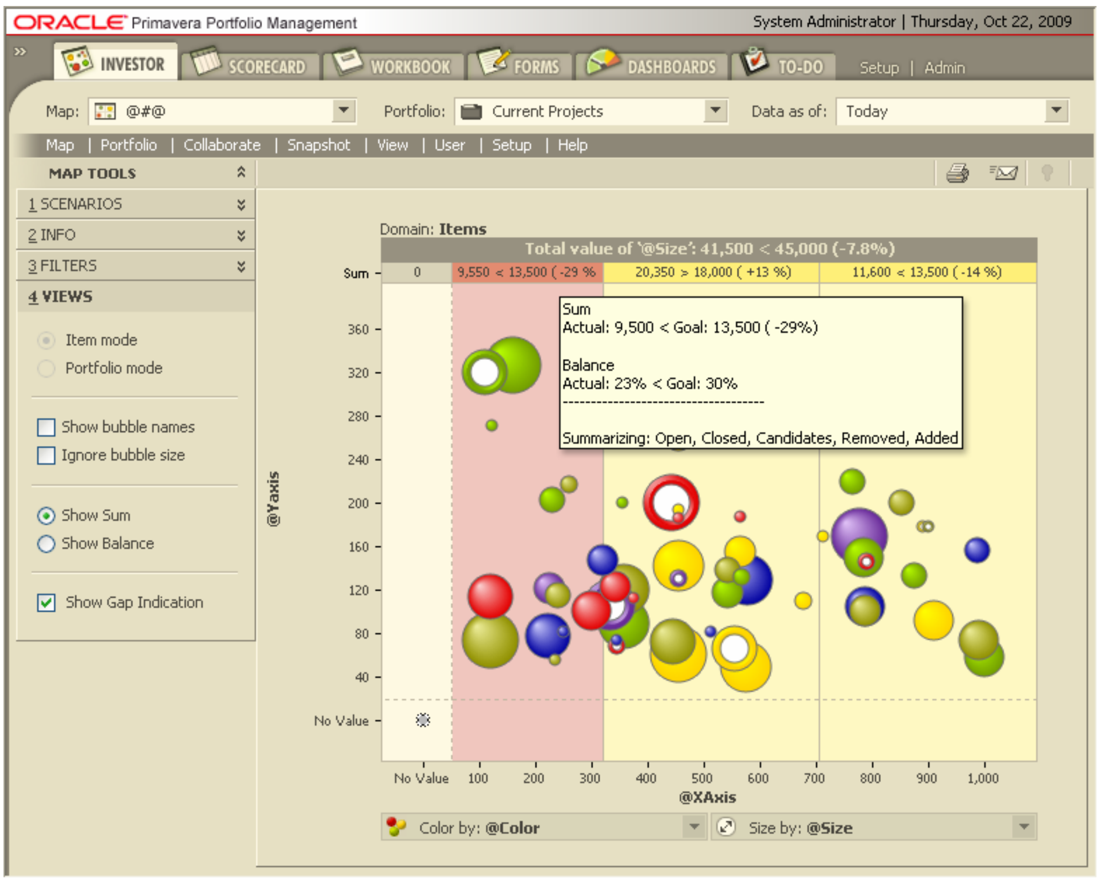
1. Negative values – The ten sizes of bubbles will be redistributed such that the bubbles/folders will represent all of the values from the lowest value to the highest values, where negative values will be considered the lowest value. See the bubble with the tooltip above.

2. No value – An 11th bubble/folder, the size of the smallest bubble but with a contour implying that it has no size will represent all Items/Portfolios whose Size category has No value. See the small green bubble above.

E. Placement of Bubbles/Folders when X/Y axis is a value list

When the X or Y axis is a value list. Each value assumes a range on the map. Bubbles/Folders which fall within the same value should be placed on the identical spot. The drawback of this would be the convergence of many bubbles/folders on the same point with the concomitant difficulty of visually discerning the different bubbles/folders. To solve this problem, the map has always used an algorithm which scatters these bubbles within the same value range. In version 8.0 it is possible to neutralize this algorithm and have each bubble/folder within the same value range to be placed in the exact same spot.

F. Summaries, Balances and their Tooltips



Enhancements have been introduced in three areas.

1. Map and Bucket Sums

The Map or Bucket summaries express the comparison of the Actual Sums of the size by category with the Goal Sums of the size by category together with the % Deviation of the Actual Sum from the Goal Sum. This is done on both the Map Summary Bar for the entire map, and on the Bucket Summary Bar for each bucket. Two basic changes have been introduced in the summaries:

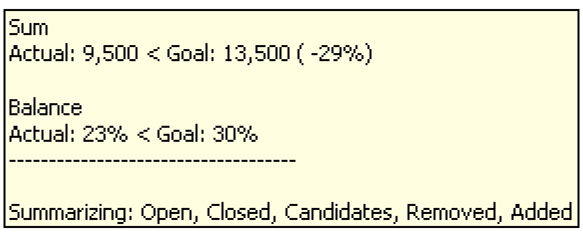
a. The front slash between the Actual sum and the Goal sum has been changed to a comparison operator (<, >, =)
b. When the actual ≠ 0 and the goal = 0 then deviation % of the actual from the goal will be N/A

2. Bucket Balances

The Balance expresses the comparison between the ratio of the Bucket and Portfolio actual sums (expressed in a %) and the Bucket goal %. This is done only for Buckets. Three basic changes have been introduced in the balance:

a. The actual balance will always be displayed with a % sign
b. When the bucket actual ≠ 0 yet the portfolio actual = 0 then the actual balance will be N/A
c. The front slash between the Actual balance and Goal % will be changed to a comparison operator or upright, according to the rules outlined below.

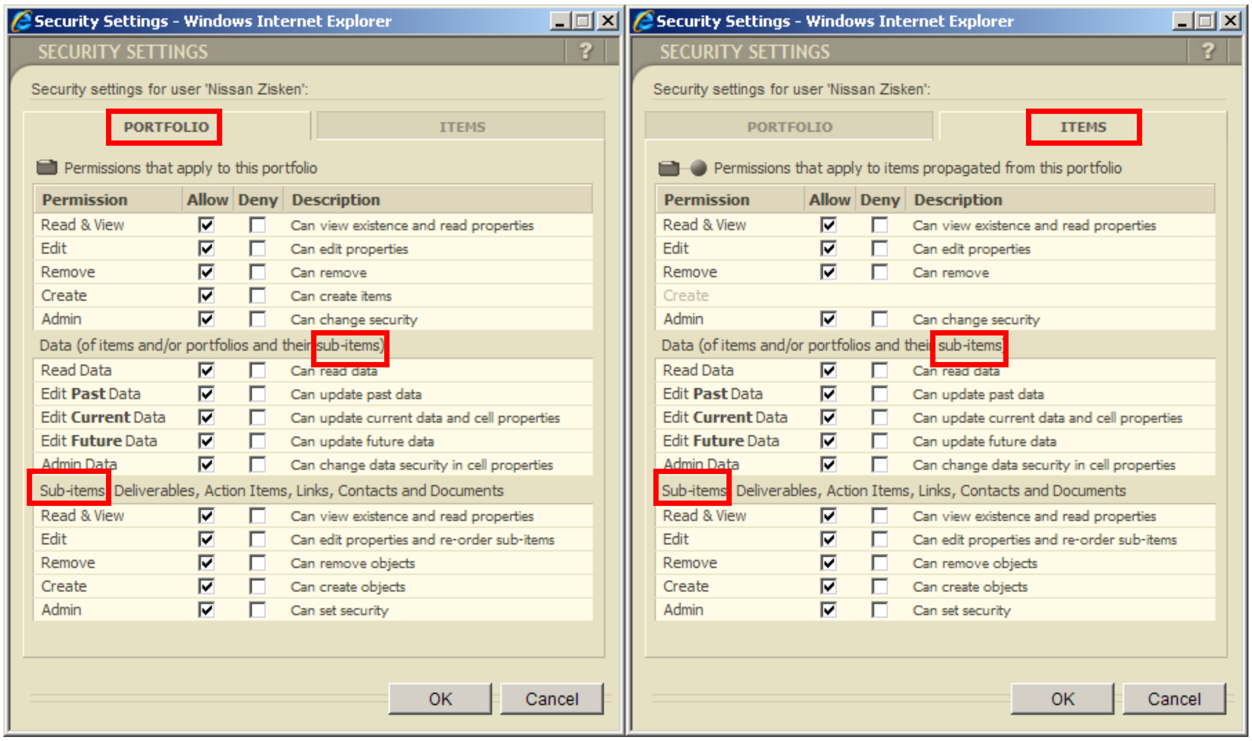
3. Bucket Sum and Balance Tooltips



a. The Actuals and Goals for both the Sum and Balance are now clearly labeled as such.
b. The Sum, Balance and Summarizing parts of the tooltip are distinctly separated

Sub-item Security

Security of the sub-item entity itself is now defined together with the Workbook security (Deliverables, Action Items, Links, Contacts and Documents). This affects the ability to view the sub-item, edit and re-order it, create and remove it, and setting its security. These permissions are now granted separately for Portfolios and Items. The sub-item data is now also defined separately for Portfolios and Items, with each being set in their respective Data areas.



A. The Sub-item entity's security is now defined together with that of the Deliverables, Action Items, Links Contacts and Documents separately for the Portfolio and the Item.

B. The Sub-item's data security for Items continues to be defined in the same place yet the Sub-items data for portfolios is now defined together with the Portfolio data.

C. This change has not affected any of the Permissions Sets except for that of Administrative access. In 7.5 that Permission set had rights to Edit and Remove sub-items from both Portfolios and Items while in PPM 8.0 that is no longer allowed.

D. Since there is no security upgrade for this change in sub-item security, it is important to define the potential changes in sub-item security in order plan how to make the necessary changes manually.

Alerts

The Category Value Condition Met and the Category Indicator Condition Met alerts will now be triggered not only by the data of the Items or Portfolios defined in their Scope, but also by data of their respective sub-items.

A. It will no longer be possible to define these alerts for their portfolios or items without the sub-items, nor can they be defined for the sub-items alone without also including the portfolio or item.

B. The other five types of Alerts continue to be triggered only for portfolios or items and not for their sub-items.

C. The alert message for *Category Value/Indicator Condition Met* supports two keywords relating to the Scope of the message: [Scope Name] and [Scope ID]. In the case of an alert being triggered by a *Category Value/Indicator Condition Met* for a sub-item, [Scope Name] should translate to the following:

   '<Dynamic_List_type_Name>: <Sub-Item_Name> (in <Item/Portfolio_Name>)'

   since the sub-item name need not be unique per type within Item/Portfolio or across Items/Portfolios.

   [Scope ID] will continue to show the ID of the item/portfolio, as this is usually used in URLs, and we do not support URLs with the sub item ID.

D. When a WebService *CategoryChangedAlert* is triggered as a result of a category value/indicator change, the alert engine provides the alert consumer with information about the event. This information is in the form of a **psPortfoliosEventInfo** object. One of the fields is **ScopeInfo** (of type **psPortfoliosItemInfo**), which contains information about the item/portfolio that triggered the event.
   When the event is triggered due to a change in a sub-item category, **ScopeInfo** will contain information about the item/portfolio to which the sub-item belongs. This will be done via a new field added to **psPortfoliosEventInfo**, called **SubItemScopeInfo**, of type **psPortfoliosSubItemInfo**.

E. When triggered due to a change in a sub-item category, the following **SubItemScopeInfo** fields will be assigned values:

   1. **SubItemType**

   2. **SubItemTypeID**

3. **SubItemName**

4. **SubItemProSightID**

5. **SubItemUCI**

6. **SubItemSerial**

F. **Best Practices:** Since *Category Value/Indicator Condition Met* alerts now trigger both on Items/Portfolios and their sub-items…

1. To define an alert which will be triggered by a category for only the Item/Portfolio but not its sub-items, do not use that category in the dynamic lists for these Items/Portfolios.

2. Similarly, to define an alert which will be triggered by a category for only the sub-items of an Item/Portfolio but not for the Item/Portfolio itself, only use that category in the dynamic lists for these Items/Portfolios but not for the Items/Portfolios themselves.

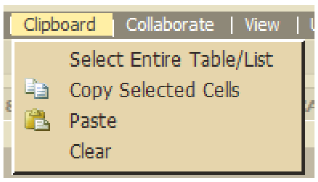
Dynamic List

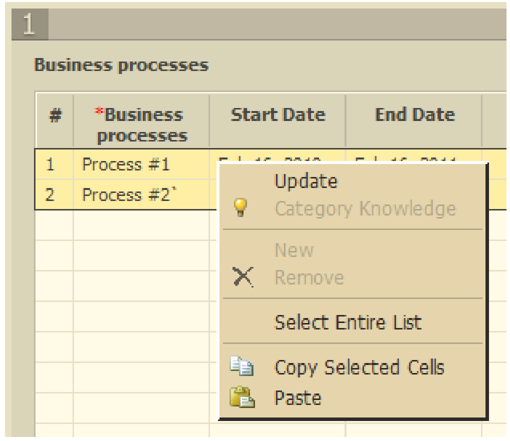
Two enhancements have been introduced.

1. The multiple cell paste functionality from internal (Scorecard or Table) or external sources, are now also supported in the Dynamic List.
2. The Dynamic List can be configured so that it will not display its New, Remove and re-ordering editing controls.

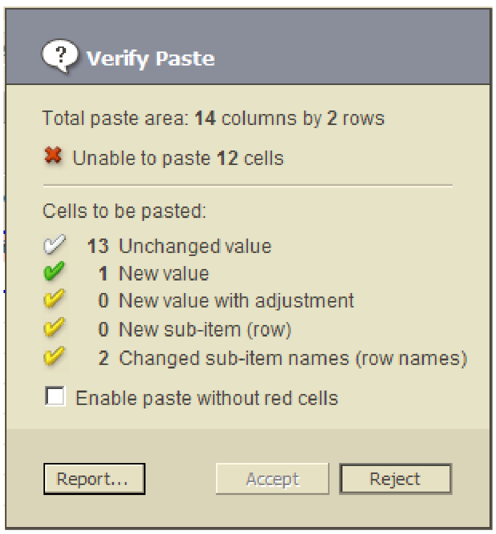
Copy & Paste

The multiple cell paste functionality now supported in Dynamic Lists works on both Category data and the sub-items themselves. Selecting, Copying and Pasting can be done either with the mouse and keyboard functions or via the Clipboard menu or a Dynamic List drill-down menu.





In sub-items it is possible to copy into the sub-item name field both to change the name of existing sub-items and to create new sub-items as can be seen in the Verify Paste dialog box below and its concomitant report.



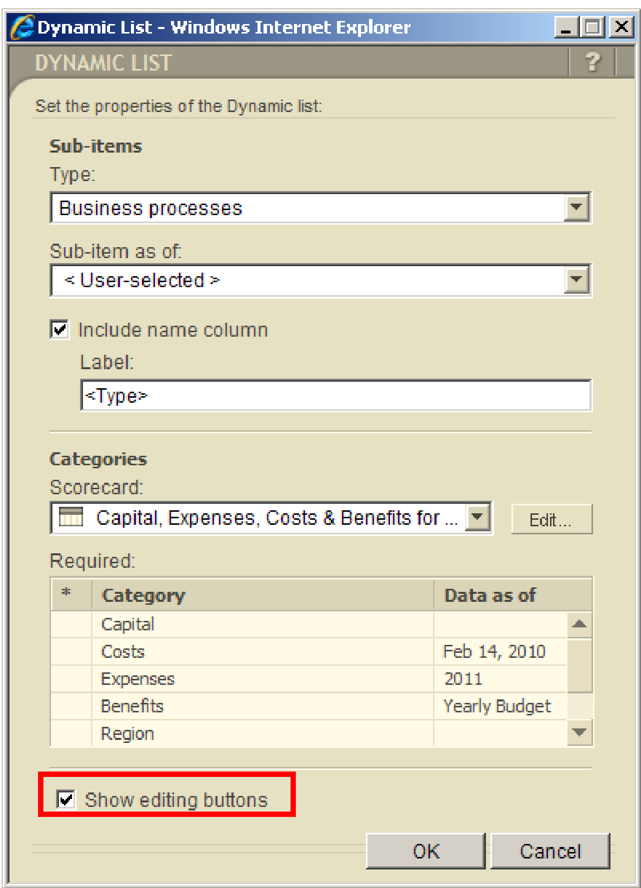
Business processes (Dynamic List) **/ All Projects** (Item)
Found in Form/Tab: **Capital, Expenses, Costs & Benefits / Cap, Exp, Cost, & Ben Form - Dynamic List**

Dynamic List Paste Report, printed by: System Administrator, **Feb 18, 2010**

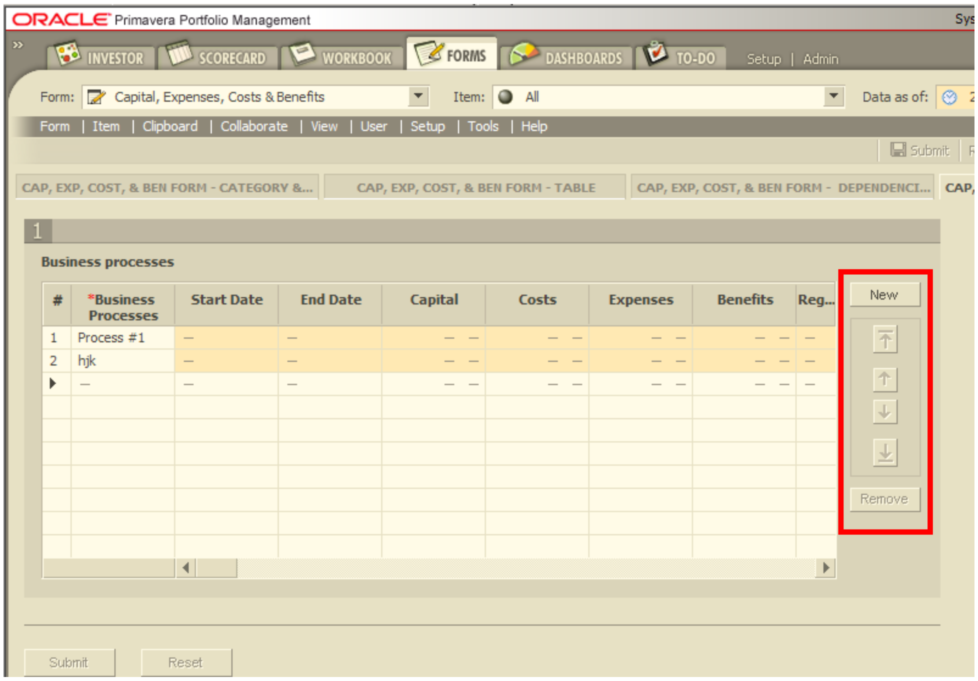
Pasted Cells	Displayed Cells: ☑ White	☑ Green	☑ Yellow	☑ Red
# Sub-Item	**Categories**	**Current Value**	**New Value**	**Result**
1 *Business processes	#	1	1	—
1 *Business processes		Process #1	*Business processes	Sub-item name changed
1 *Business processes	Start Date	Feb 16, 2010	Start Date	Error: Pasted data is not in a supported date format
1 *Business processes	End Date	Feb 16, 2011	End Date	Error: Pasted data is not in a supported

				date format
1 *Business processes	Capital	—	Capital	Error: Pasted data is not a valid numeric value
1 *Business processes	Capital Indicator	—	Capital Indicator	Error: Pasted data is not an indicator
1 *Business processes	Costs	—	Costs	Error: Pasted data is not a valid numeric value
1 *Business processes	Costs Indicator	—	Costs Indicator	Error: Pasted data is not an indicator
1 *Business processes	Expenses	—	Expenses	Error: Pasted data is not a valid numeric value
1 *Business processes	Expenses Indicator	—	Expenses Indicator	Error: Pasted data is not an indicator
1 *Business processes	Benefits	—	Benefits	Error: Pasted data is not a valid numeric value
1 *Business processes	Benefits Indicator	—	Benefits Indicator	Error: Pasted data is not an indicator
1 *Business processes	Region	—	Region	Error: Pasted data is not part of the value list
1 *Business processes	Region Indicator	—	Region Indicator	Error: Pasted data is not an indicator
2 Process #1	#	2	2	—
2 Process #1		Process #2`	Process #1	New sub-item added
2 Process #1	Start Date	Feb 16, 2010	Feb 16, 2010	—
2 Process #1	End Date	—	Feb 16, 2011	OK
2 Process #1	Capital	—	—	—
2 Process #1	Capital Indicator	—	—	—

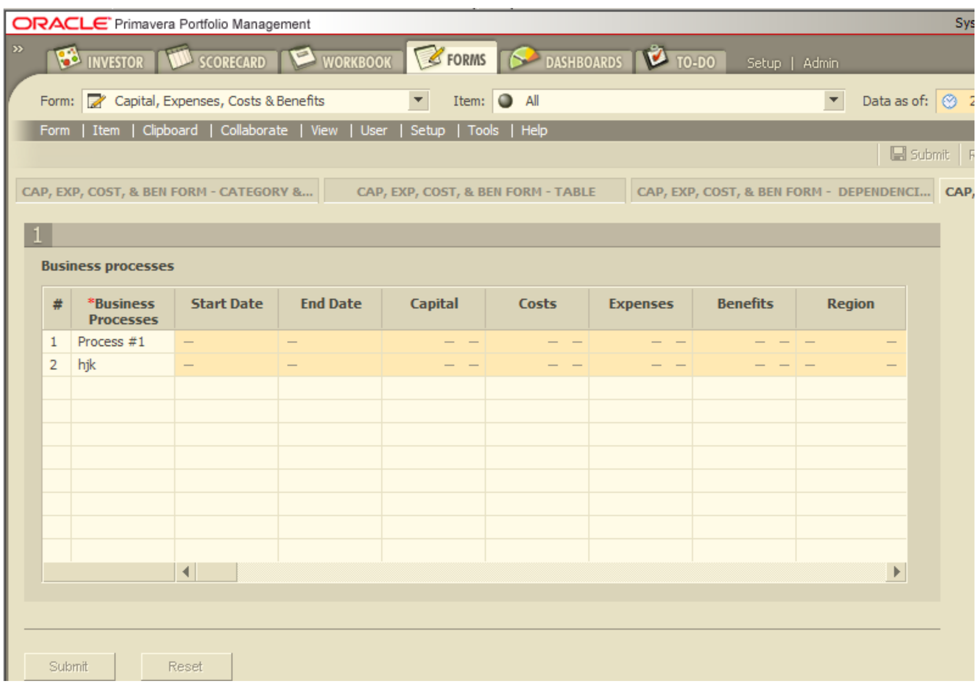
Show/Hide the Editing buttons



The *Show editing buttons* checkbox, which by default is checked, determines whether the Dynamic List will display the *New* button, the *Remove* button, and the 4 buttons for re-ordering the rows.



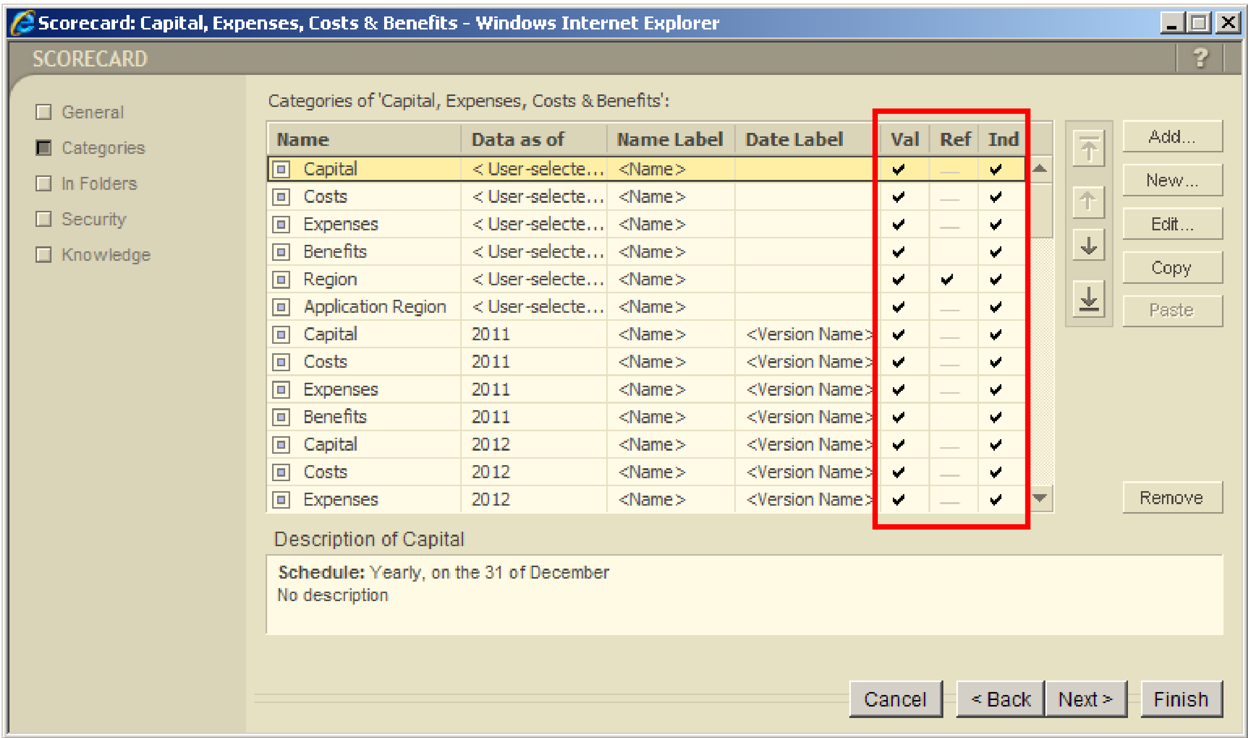
The Dynamic List without its editing controls will display as follows:



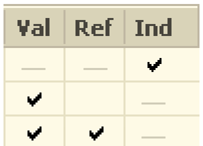
The end-user is now prevented from creating a New sub-item, removing an existing one, or re-ordering sub-items them within the dynamic list, even if from a security perspective he has permission for all of these actions.

Scorecard: Configurable Value, Indicator and Reference Columns

The display of the Value, Indicator and Reference values of each category in a scorecard can now be determined by the configurator per category per scorecard and not only per category across all scorecards.



A. Scorecard Wizard - Categories step

1. 

- **Val**ue, **Ref**erence and **Ind**icator columns – these additional columns allow the configurator to filter out from the category either of the data types or reference value from being displayed in the scorecard

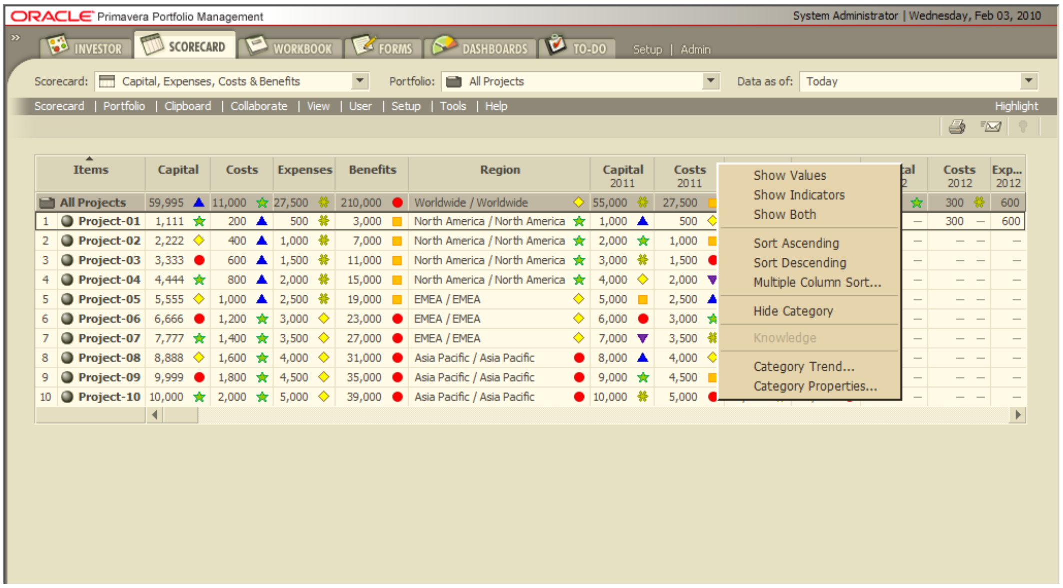
    a. Cell Default: These three columns reflect the parameters of the category as defined in its wizard; i.e., a checkmark  will appear in each column for which the selected category the specific data type or reference category has been defined. A no value hyphen will appear where the specific data type or reference category has not been defined. The configurator may choose to uncheck the cells and then these data types or reference category value will not be displayed on the scorecard.

    ~ If a **Val** cell of a category is blank, whether it be the default setting based on its properties in the Category wizard or because the configurator unchecked it, then its corresponding Reference cell will be disabled and emptied.

    b. These settings will determine the display of the category in the scorecard whether viewed in the Scorecard module or as the Item Properties of a Dependencies List or the categories of a Dynamic List with the following differences:

    ~ Reference values of Scorecard categories do not display when in context of a Dependencies List in the Workbook/Form/Dashboard module or a Dynamic list in the Form/Dashboard module.

    ~ If the configurator has chosen to display both the value and the indicator of a Scorecard category, the end-user is not able to determine which of the two to display when in context of a Dependencies List in the Workbook/Form/Dashboard module or a Dynamic list in the Form/Dashboard module.

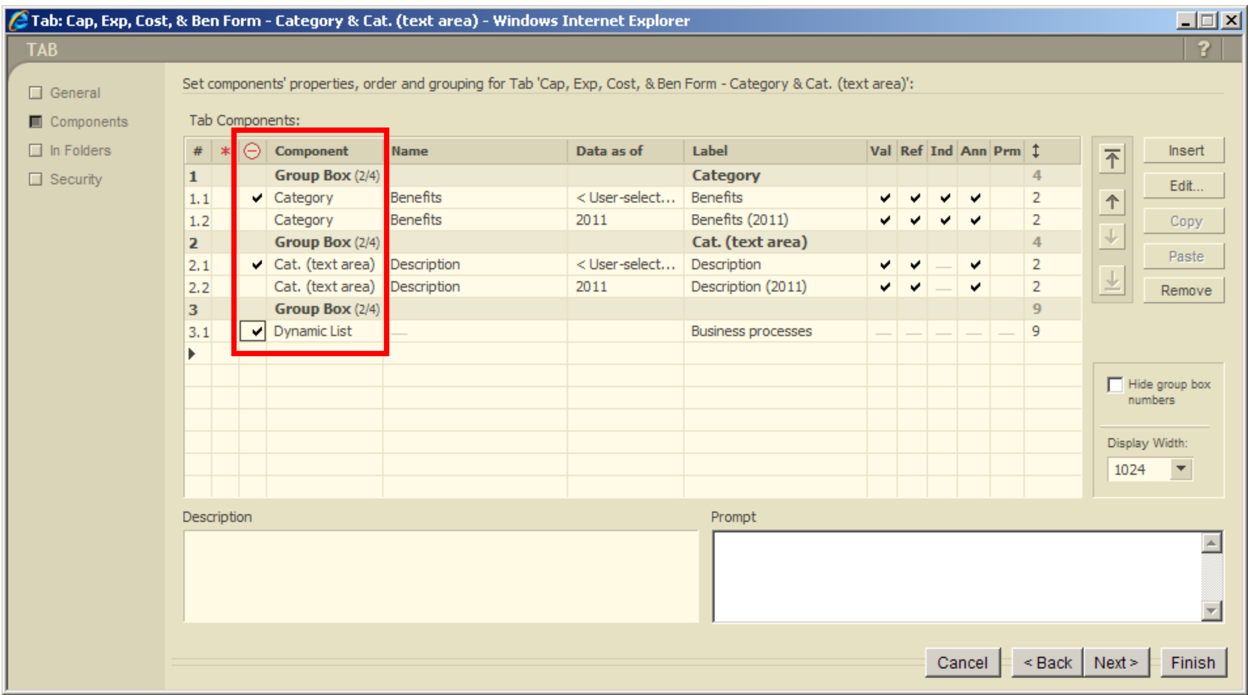


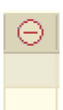
The *Show Values*, *Show Indicators* or *Show Both* will be available only when displayed in the Scorecard module.

c. If a Category has neither a Value or Indicator checked, the following prompt will pop-up when leaving the Categories step:

Form/Dashboard Tab: Read-only status for Category, Cat. (text area) and Dynamic List

The Category and Cat. (text area) and Dynamic List components can be set as Read-only on the tab wizard's component step. This will prevent data entry into the category's Value, Indicator or Annotation fields or the Dynamic List's sub-item names or category cells even for a user who has permission to edit them.



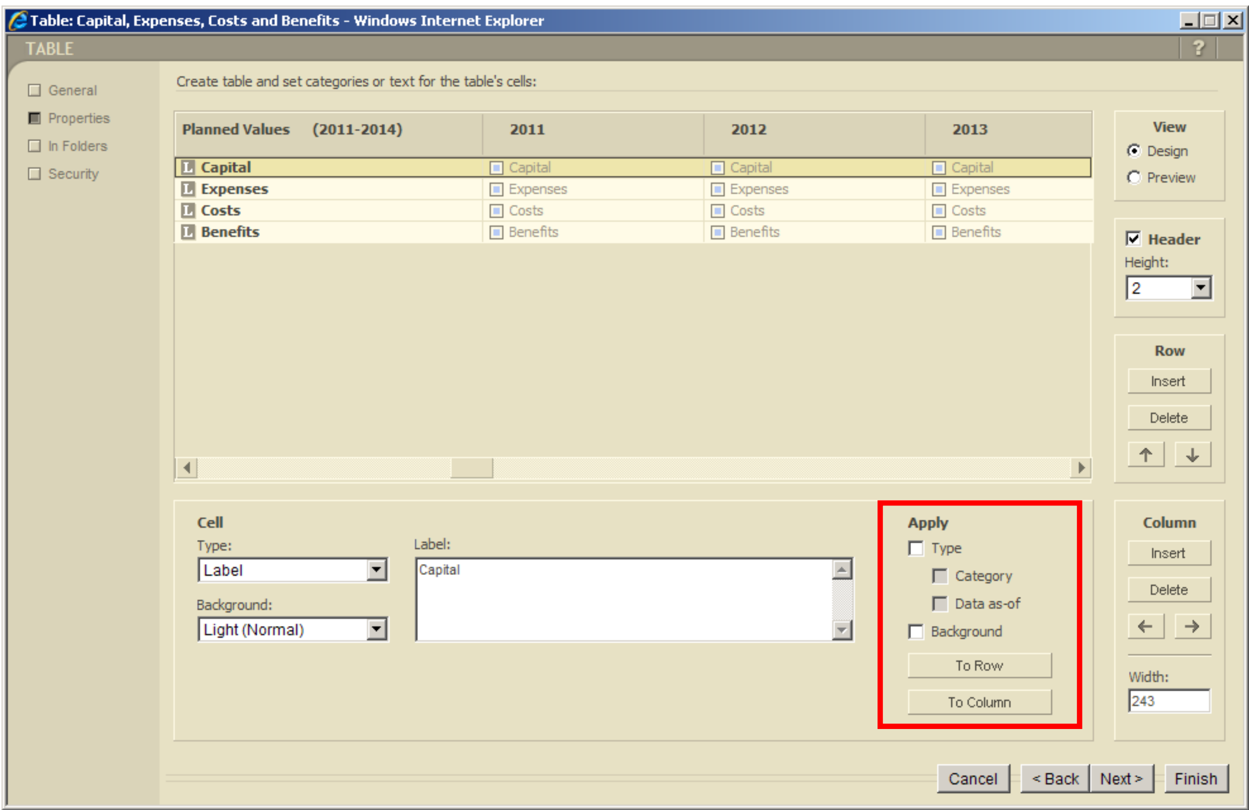
A.  - Read-only field icon – if checked, sets the component as read-only even if from a security perspective the end-user has permission to edit it. If not checked, the component can be edited only if the end-user has permission to edit the component. **Default**: Unchecked

1. The *Read-only* cell is enabled only if its corresponding *Required* field is not checked. If the Read-only field is checked then the *Required* field becomes disabled.
2. When Category and Cat. (text area) components are checked, their respective Category Value, Indicator and Annotation fields are disabled
   a. This setting will not affect any other instance of this same category even if it has the identical *Data as of* setting
3. When the Dynamic List component is checked, the entire Dynamic List including the name and category columns and the New, Remove and re-order editing buttons will all be disabled. (The

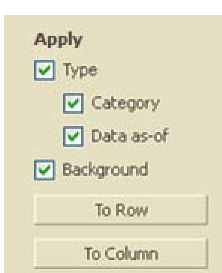
Read-only functionality for the Dynamic List was set in the Dynamic List dialog box in the previous version.)

Table wizard: Enhancement of **Apply** Cell Properties to **Row/Column** Functionality

It is now possible to apply a table cell's *Category* and *Data as of* date across an entire Row or Column in addition to its *Type* and *Background*.



To support this functionality, the **Apply** controls in the cell properties of the Properties step of the Tab wizard have been modified as follows:

A. **Apply** controls: 

1. *Type* checkbox - for applying the cell *Type* across an entire Row/Column

2. *Category* checkbox for applying the cell *Category* across an entire Row/Column

3. *Data as of* checkbox - for applying the cell *Data as of'* date across an entire Row/Column

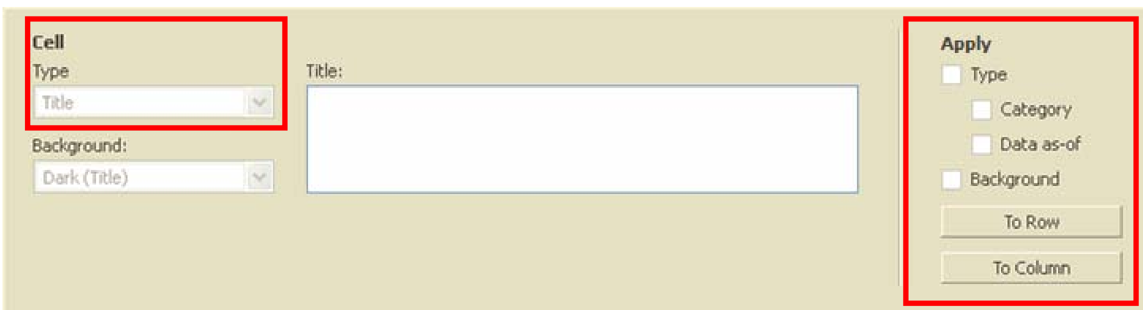
4. *Background* checkbox - for applying the cell background across an entire Row/Column

5. *To Row* button – for applying the checked attributes of the selected cell across the entire row

6. *To Column* button – for applying the checked attributes of the selected cell across the entire column

B. These controls are not enabled for all cell types.

1. *Type* = 'Title':



a. Type, Category, Data as of and Background checkboxes - disabled

b. *To Row* and *To Column* buttons - disabled

2. *Type* = 'Label'

a. *Category* and *Data as of* checkboxes are disabled whether or not *Type* is checked

3. *Type* = 'Text'

a. *Category* and *Data as of* checkboxes are disabled whether or not *Type* is checked

4. *Type* = 'Category Value', 'Category Indicator' or 'Category Annotation'

a. *Category* and *Data as of* checkboxes are disabled only when the 'Type' field is not checked

Category

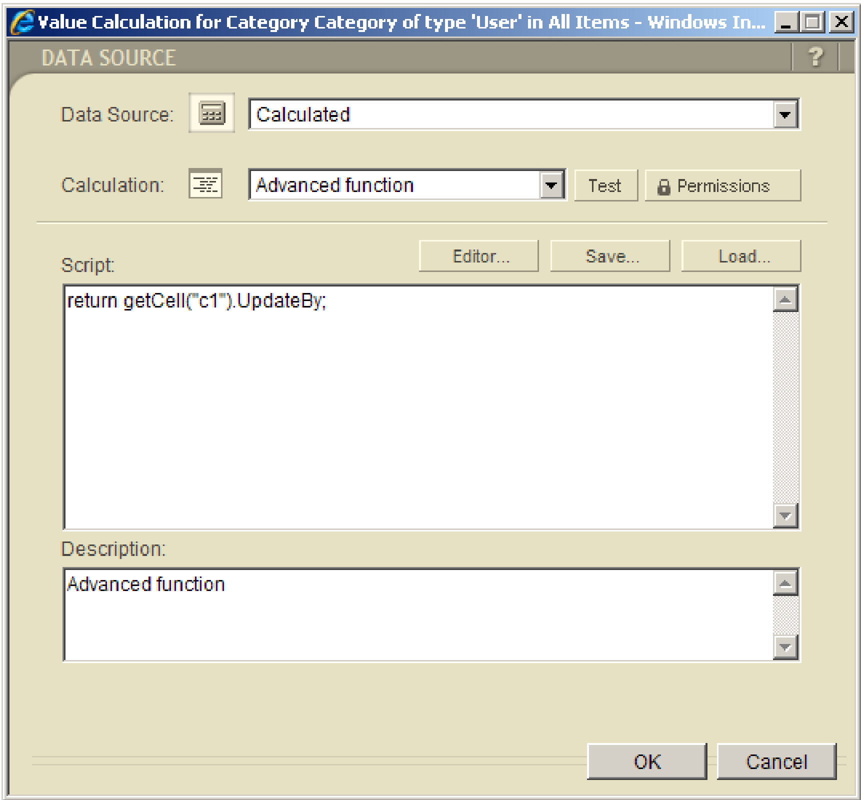
Two enhancements have been introduced.

a. User categories can now also be defined by advanced functions.

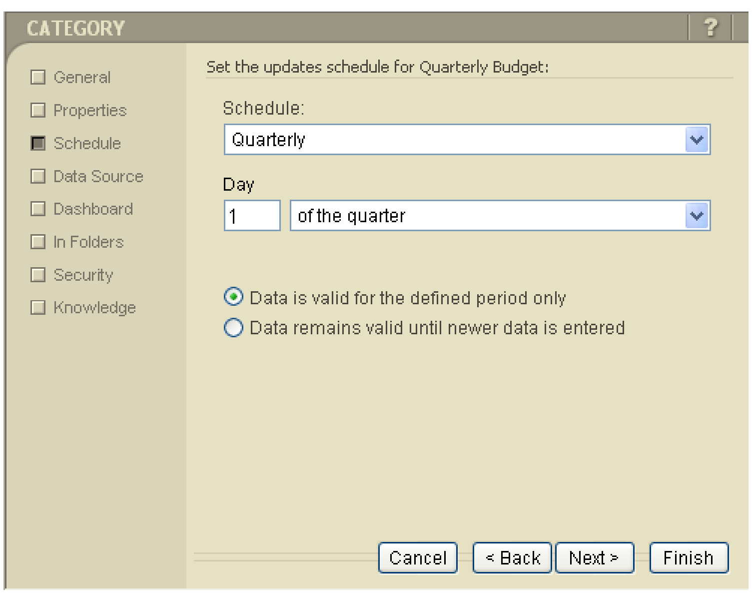
b. Scheduled categories are, by default, valid only for the period they are defined and not beyond. This default can be changed per category.

Advanced Functions on Category of Value Type User

Categories of value type User can be defined by advanced functions.



Scheduled Category Default: Expired



A. With the introduction of versioning into the product, it is recommended that the data of categories with schedules "remain valid for the defined period only". This is supported by replacing the "Data expires when out of date" checkbox with 2 radio button options,

   1. "Data is valid for the defined period only" (same as the original checkbox when checked – i.e. expiring schedule).

   2. "Data remains valid until newer data is entered" (same as the original checkbox when not checked - i.e. non-expiring schedule)

   and setting the first option, "Data is valid for the defined period only" as the default for all schedule types.

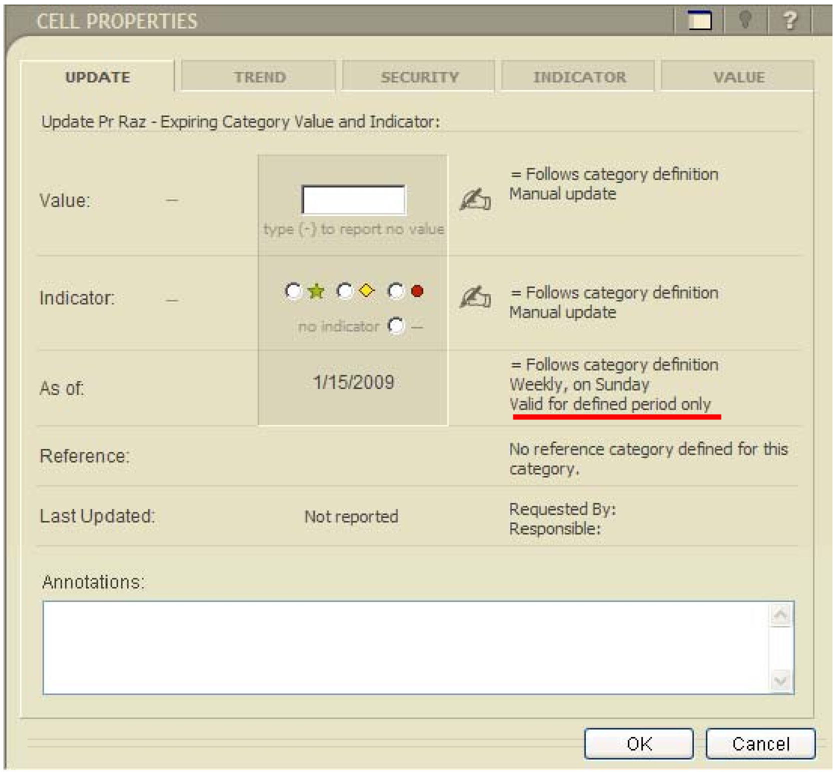
B. Product screens containing the old "expiring" schedule phrasing will be re-phrased with the new terminology:

   1. Expiring schedule: 'Valid for defined period only'

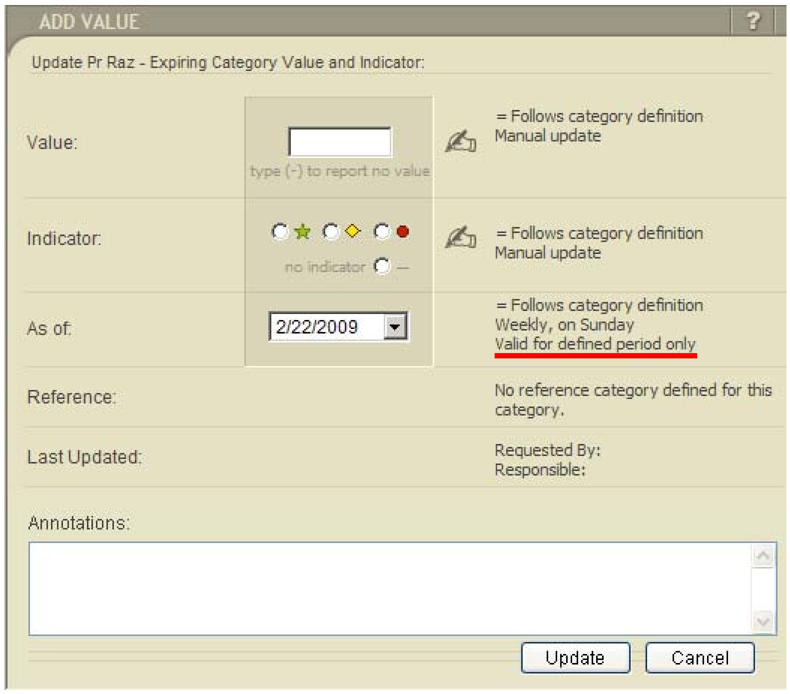
   2. Non-expiring schedule: 'Valid until newer data entered'

C. The following screens need to be changed by their As of schedule reference.

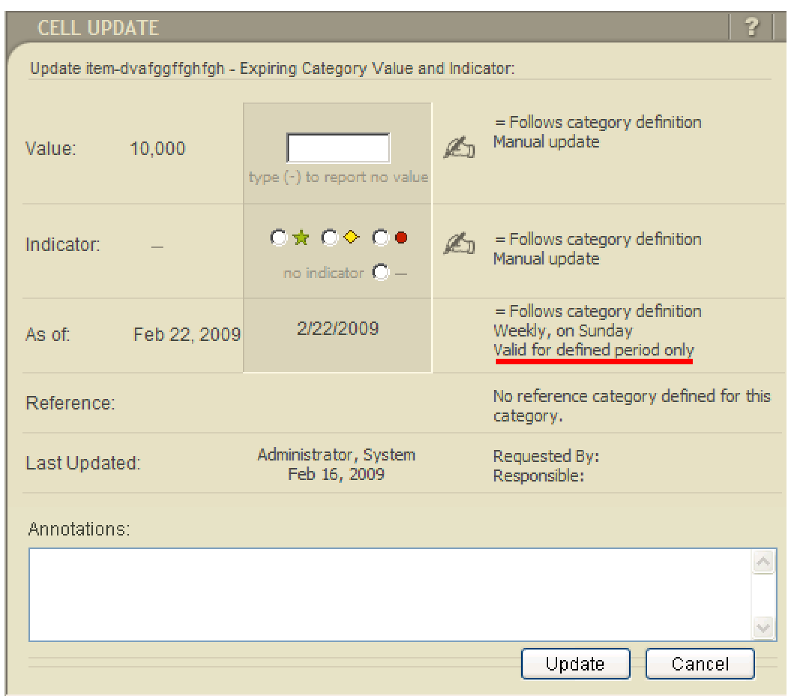
1. Cell Properties > 'Update' tab (descriptive text in 'As of' area):



2. Cell Properties dialog box/Trend tab/Add Value dialog box (via **Add** button)



3. Cell Properties dialog box/Trend tab/Cell Update dialog box (via right-click 'Update' on trend cell)



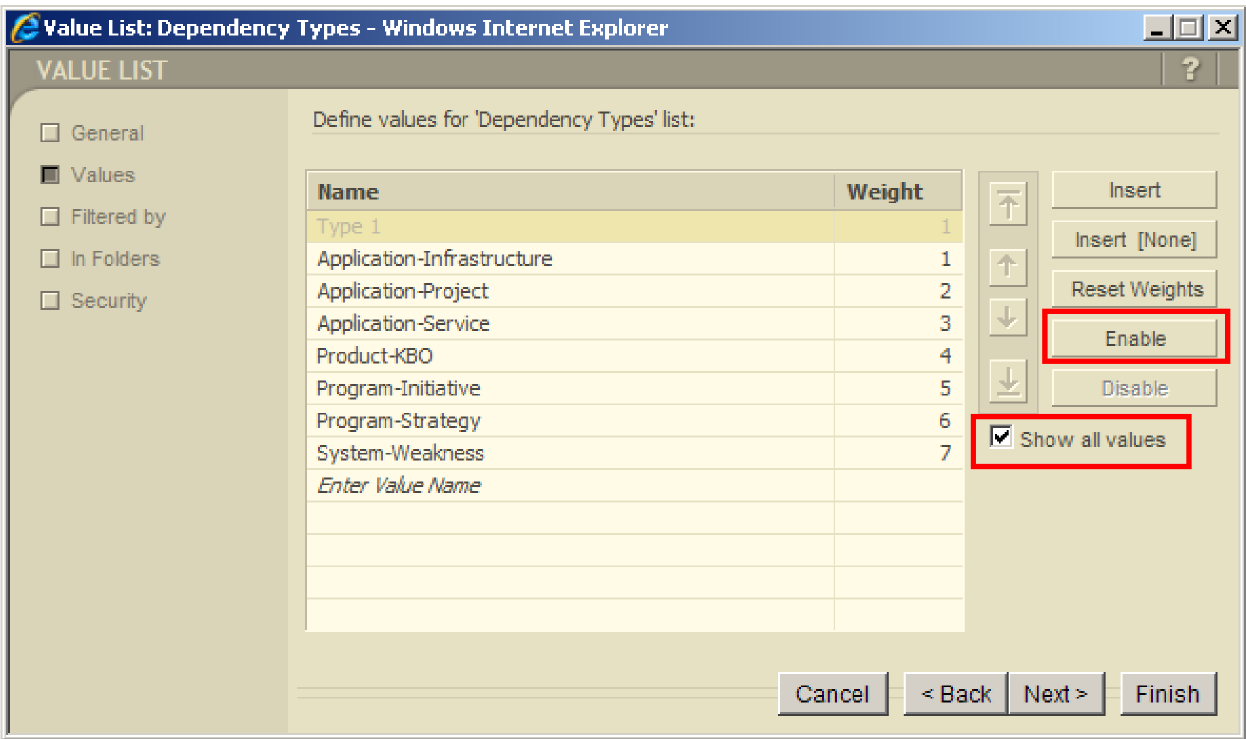
P6 Bridge for Project Management

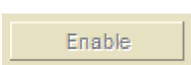
PPM 8 supports the additional functionality of updating PPM items with data from P6 role-based project spreadsheets, and PPM sub-items with data from P6 WBS level 2 spreadsheets.

For additional Project Management Bridge information see the user's guide accompanying the P6 Bridge.

Ability to Display and Re-enable Disabled Values in Value Lists

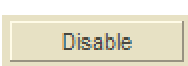
In the value list wizard, it is now possible to display the disabled values of a value list, and then to subsequently re-enable them.



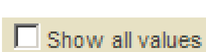
A. 

- An *Enable* button has been added on top of the *Disable* button. It is enabled only when the highlighted value is disabled

1. Enabling a disabled value also enables its weight

B. 

- the *Remove* button has been renamed *Disable*. It is enabled only when the highlighted value is enabled.

C. 

- A *Show all values* checkbox has been added beneath the buttons.

1. **Default**: Unchecked.
2. When unchecked, only enabled values are displayed and the *Enable* button is disabled.
3. When checked, both enabled and disabled values are displayed

D. *Reset Weights* – renumbers from 1 to N (where N is the total number of Enabled values). Even if the disabled values are displayed, they are not renumbered.

E. Sorting by *Name* or *Weight* the Enabled and Disabled values together as one list whether or not the disabled values are shown.

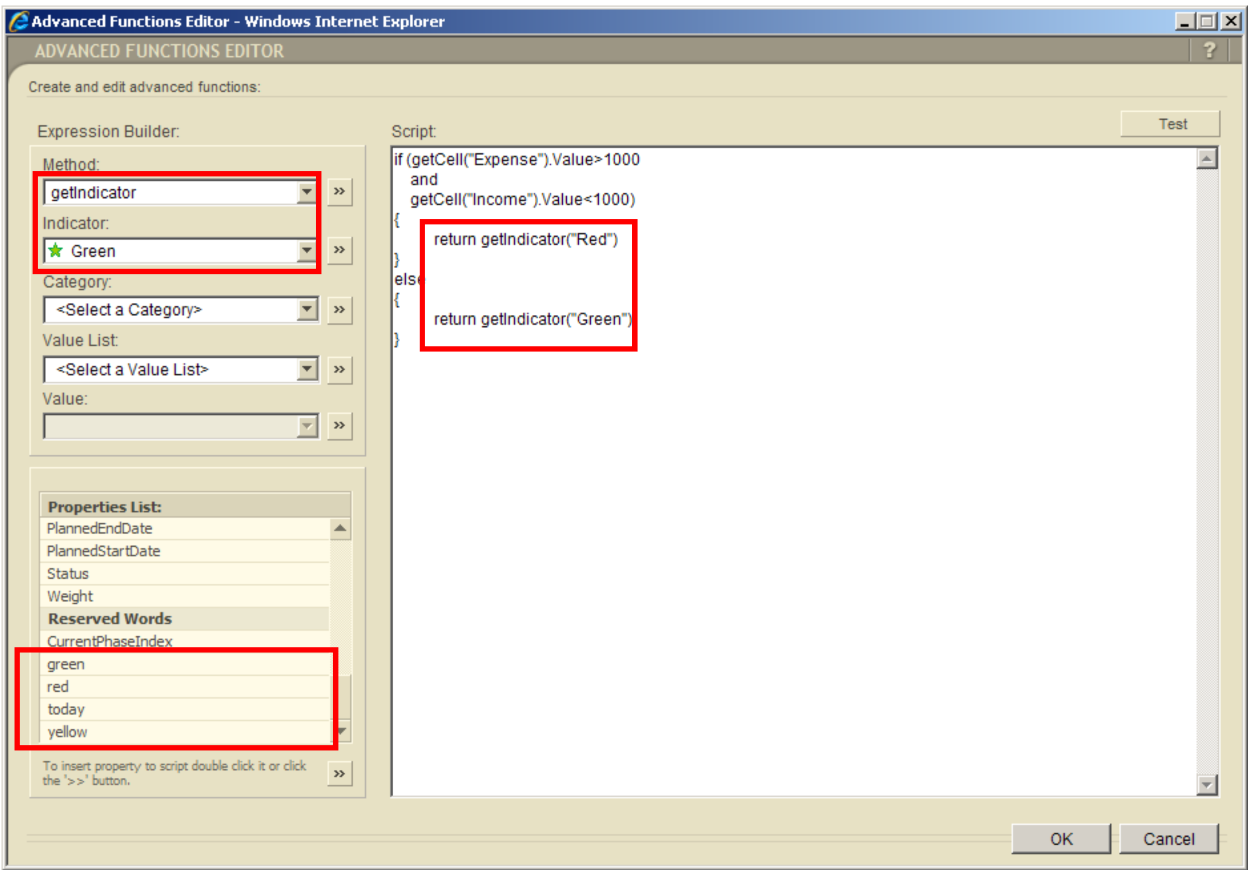
F. One cannot exit the Values step if the list of values includes two or more occurrences of a single value whether enabled or disabled. The system will prompt accordingly.

General Maintenance

Advanced Function Editor and Functions Syntax

To support the new Indicators list in the function engine, a new method ‘getIndicator(“<Indicator_Name>”)’ has been added to the Advanced Functions Editor, with an Indicator drop down field for selecting the Indicator name. this field is enable only when the Method = getIndicatorColor.

Note: Although this new method is encouraged to be used, the old green, red and yellow syntax will still be supported.



Function Include File Stored in the Database

The function ‘Include’ file location has been changed from being stored as a file in a sub-directory of the product to being stored in the database. Function ‘include’ file must be uploaded into the database before changes will take effect. This is done using a command line utility called psGlobalsConfig. The full command that should be used to upload the function include file is:

```
psGlobalsConfig /login=<USER> /pwd=<PASSWORD> /global=FE_IncludeFile /upload /file=<FILENAME>
```

A. <USER> must be replaced with a Primavera Portfolio Management username

B. <PASSWORD> with the corresponding password of that username

C. <FILENAME> with the name of the function include file to be uploaded

D. By replacing the /upload in the above command with /download, it is possible to download an existing function include file from the database.

Packager

A. The Packager has been upgraded to support the Indicators list and Versions.

B. In addition it includes derived entity support for Versions in the following fields:

1. 'Data as of' in the Investor Map
2. 'Data as of' per category in the Scorecard
3. 'Data as of' in the Tab
    a. 'Data as of' per Category, Cat. (text area) and Graph components in the Tab itself
    b. 'Sub-item as' of in the Dynamic List dialog box
    c. 'Source as of' and 'Target as of' in the Transfer Tool dialog box
4. Table - 'Data as of' per Category Value, Indicator or Annotation cell type

C. Although it is recommended when exporting packages with Indicator Functions to include the Indicators list in the package, there is new functionality in the Packager which supports the mapping the Indicators of the imported package to the Indicators of the target system without having to transfer the Indicator list itself.

D. It maintains full backwards compatibility with packages from ProSight Portfolios 5.0 SP3 and above.

Open API syntax

A. **SubItems** now have a life span

1. Background

The main API for creating/modifying sub-item information used to be

psPortfoliosSubItem.SyncSubItem.

This API is now replaced with **psPortfoliosSubItem.SyncSubItemAsOf**, which takes an extra sAsOf parameter.

When calling the new API, the system will test the existence of sub-items as of that date, and, if needed, will create sub-items whose lifespan starts at the date specified. The new API has the following restriction: Cell values specified for a sub-item cannot have asOf values that are earlier than the date specified as the sAsOf parameter of the API.

2. Backwards compatibility

The old (now deprecated) **psPortfoliosSubItem.SyncSubItem** API, that does not have an sAsOf parameter, creates sub-items whose life span starts at a very old date (1/1/1990).

B. **CategoryValueChanged** alert now triggers for sub-items

1. Background

When a WebService CategoryChangedAlert triggers as a result of a category value/indicator change, the alert engine provides the alert consumer with information about the event. This information is in the form of a **psPortfoliosEventInfo** object. One of the fields is **ScopeInfo** (of type **psPortfoliosItemInfo**), which contains information about the item/portfolio that triggered the event.

2. New in 8.0

In 8.0, the event may also be triggered because of a change in a sub-item category. In this case, **ScopeInfo** contains information about the item/portfolio that the sub-item belongs to (including the item/portfolio's UCI). Information about the sub-item is shown in the new **psPortfoliosEventInfo.SubItemScopeInfo**, field (of type **psPortfoliosSubItemInfo**). In case the event is triggered because of a change in a sub-item category, the following fields of SubItemScopeInfo will get values:

- SubItemType

- SubItemTypeID

- SubItemName

- SubItemProSightID

- SubItemUCI

3. Best Practices

Since Alerts triggering on Items/Portfolios will automatically trigger on their sub-items, to define an alert which will be triggered for only an Item/Portfolio but not its sub-items, that category should not be used in the dynamic lists for these Items/Portfolios. Similarly, to define an alert which will be triggered for only the sub-items of an Item/Portfolio but not the Item/Portfolio itself, that category should be used only in the dynamic lists for these Items/Portfolios but not for the Items/Portfolios themselves.

C. Open API support for new indicators

1. Introduction

Open API calls in PPM 8.0 represent indicators by the ID or the Name. The color and shape have no representation in Open API.

See **psPortfoliosCellInfo.CellIndicatorID** and **psPortfoliosCellInfo.CellIndicatorName**

a. To obtain or interpret the ID of indicators, an Open API program can call **psPortfoliosValueList.GetValues**("Indicators").

   Note that the ID differs from the ordinal number seen on the INDICATORS dialog (shown below).

b. Open API calls that return indicators (such as **GetMultipleCellValues**) return the ID and Name of the indicator.

c. Open API calls that take indicators as input (such as **UpdateMultipleCellsEx**) accept the ID or the Name of the indicator.

2. Backwards compatibility

a. The pre-8.0 notation (an enumeration named psINDICATOR with the values IND_RED, IND_YELLOW, IND_GREEN) is still supported for backwards compatibility. However, that notation is of little use if the default setting of indicators is changed.

3. The details

a. **psPortfoliosCellInfo** now has two new fields:

- ~ **CellIndicatorID** – contains the ID of the indicator form "Indicators" values list, or 0 to sign no indicator
- ~ **CellIndicatorName** – contains the name of the indicator, or null/empty string to sign no indicator
- ~ The existing **CellIndicator** field (containing a value from psINDICATOR) is still supported for backwards compatibility but should not be used for new code.

b. Open API calls that return indicators (such as **GetMultipleCellValues**) return both CellIndicatorID and CellIndicatorName (and CellIndicator for backwards compatibility). This is relevant for the following APIs:

- ~ **psPortfoliosCell**
  - GetMultipleCellValues
  - GetChildrenMultipleCellValues
  - GetMultipleCellValuesAsOf
  - GetChildrenMultipleCellValuesAsOf
  - GetMultipleCellHistories
  - GetSubItemsMultipleCellValuesAsOf
- ~ **psPortfoliosSubItem**
  - GetSubItemList
  - GetSubItemListAsOf

c. Open API calls that take indicators as input (such as **UpdateMultipleCellsEx**) accept the indicator thru CellIndicatorID or CellIndicatorName (caller program can decide which one to use, as well as CellIndicator for backwards compatibility). This is relevant for the following APIs:

- ~ **psPortfoliosCell**
  - UpdateMultipleCells
  - UpdateMultipleEditableCells
  - UpdateOnlyModifiedCells

- UpdateMultipleCellsEx
- The method 'Update' now becomes obsolete.

~ **psPortfoliosSubItem**

- SyncSubItems
- SyncSubItemsAsOf

d. Regarding QBPs and Alerts, psCELL_PART now has a new value:

~ CPRT_INDICATOR_COLOR – means that the query is specified in terms of indicator Name / ID

~ The value CPRT_INDICATOR is still supported for backwards compatibility, meaning the query is specified in terms of psINDICATOR.IND_RED, psINDICATOR.IND_YELLOW, psINDICATOR.IND_GREEN.

e. Open API calls that define queries involving indicators (such as AddNewQBP2) should specify CellPart = psCELL_PART.CPRT_INDICATOR_COLOR to sign that a query part is about indicators. This is relevant for the following APIs:

~ **psPortfoliosPortfolio**

- AddNewQBP2
- UpdateQBP2
- SynchronizeQBP2
- GetItemListByQuery

~ **psPortfoliosAlert**

- AddCategoryChangedAlert
- AddMultipleCategoryAlert

~ **psPortfoliosWebServiceAlert**

- AddCategoryChangedAlert
- AddMultipleCategoryAlert

f. Representation of Indicator values in EventSink (the program activated by a WebServiceAlert):

All psPortfoliosWebServiceAlert.Add* methods have an *sWebServiceNameSpace* parameter. The documentation in 7.5 states: *Should always hold the constant value* ***http://prosight.com/wsdl/7.0/EventSink/*** In 8.0, there is another valid value: ***http://prosight.com/wsdl/8.0/EventSink/***

- The *sWebServiceNameSpace* parameter modifies the way **AddCategoryChangedAlert** behaves if *transition*.CellPart = CPRT_INDICATOR or CPRT_INDICATOR_COLOR. The effect of *sWebServiceNameSpace* is controlling the indicators are supplied to EventSink by WSEventSink.categoryConditionMet when the event fires.
- With sWebServiceNameSpace = **http://prosight.com/wsdl/7.0/EventSink/** (old notation), indicators are represented as integer values from psINDICATOR. With this notation, only Green, Yellow and Red (the default indicator values) can be represented. All other indicator values (if enabled by the administrator) are represented as psINDICATOR.IND_NONE.
- With sWebServiceNameSpace = **http://prosight.com/wsdl/8.0/EventSink/** (new notation), indicators are represented as either integer IDs (relevant for CompareValue, PreviousValue and TriggerValue properties), or as the indicator names (relevant for CompareDisplayValue, PreviousDisplayValue and TriggerDisplayValue properties). This notation is suitable for all indicators.

Generally speaking, an EventSink program that has to deal with indicators received via WSEventSink.categoryConditionMet have to be written for one notation or the other, but cannot handle both. When registering the alerts thru **AddCategoryChangedAlert**, the registering program should chose the value for sWebServiceNameSpace according to how the EventSink program was written.

Reports

Category Usage Report

Two new features were added to the Category Usage Report:

A. The ability to produce a Category Usage Report for multiple categories

B. Listing of the top-level category containers (Investor Map, Scorecard, Form and Dashboard) in which the categories are found and not only the lowest level container (e.g., Tab, table, Graph, etc.)

Scorecard System Report

The Scorecard System Report was adjusted to include all *Data as of* and *Date Label* options.

Data Entry Log

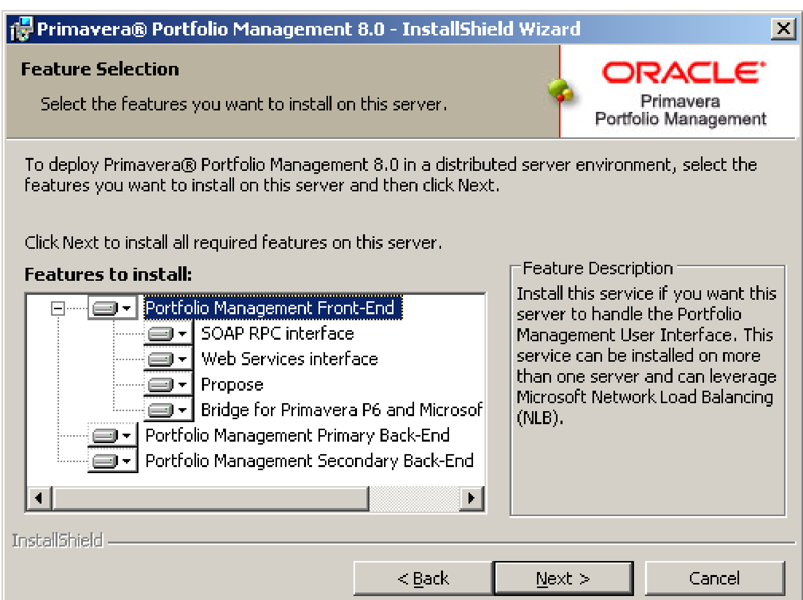
The Data Entry Log now records all sub-item removal, creation and re-ordering in addition to the changing of its category data.

Indicator Functions

There is a new System Report, accessed from the Admin/Reports tab, called Indicator Functions which, similar to the report accessed in the Indicators dialog box, describes per enabled/disabled Indicator which Basic and Advanced Indicator Functions would be affected if the Indicators enabled/disabled status would be changed.

Single Installation Program for Entire System

There is now a single Installation program for the entire Primavera Portfolio Management system. This includes the Portfolio Management Front-End together with the Soap RPC interface, the Web Services interface, Propose and the Bridge for Primavera P6 and Microsoft 2007, the Portfolio Management Primary Back-End which installs the Function engine, and the Portfolio Management Secondary Back-End for Function engine scale-out.



By default all services will be installed. Undesired services can be excluded.

System and other Setup Objects

A. System Folders cannot be deleted.

B. The 'Administrators' User Group cannot be deleted.

C. Contacts may be formally defined as part of a User Group. This requires that Contact Names be unique

Platform

64-bit Support

A. P6 bridge for Project Management

B. MSP 2007 bridge for Project Management

C. Propose

Operating Systems

A. Windows Server 2003 32-bit

B. Windows Server 2003 64-bit

C. Windows Server 2008 32-bit

D. Windows Server 2008 64-bit

E. Windows Server 2008 R2 64-bit

Databases

A. SQL Server 2005 and 2008

B. Oracle 10.2.0.4