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About Daptiv PPM

Fall ’07 Edition

Last revised: November 8, 2007

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About Daptiv PPM Fall ’07 Edition

Introduction

The Fall '07 Edition of Daptiv PPM is a powerful update for our customers and includes a number of key new features as well as improvements to existing features. The entire user interface has been refreshed to reflect the new Daptiv brand and is intended to provide a clean and easy to use interface for our customers.

We are committed to continually improving Daptiv PPM and every release includes new and updated features. We rely on input from customers and end-users to help us address business problems adequately. Your input is welcome.

This document introduces new and improved features and provides some "walk through" scripts to help you explore the changes to Daptiv PPM. Also included are known issues specific to this release.

Reporting

Daptiv PPM Fall '07 adds powerful new reporting capability that allows you to report on virtually all data within your PPM enterprise, including custom data and dynamic applications. You can create reports containing graphs and charts, reports with drill-through to other detailed reports, reports that give you information about custom applications and custom data within native PPM applications.

- **Daptiv Report Builder**—The Report Builder provides a quick way for licensed users to create queries and simple reports to answer immediate business questions. Report Builder reports can be saved and shared and can be included in dashboards (see below).
- **Daptiv Advanced Report Builder**—The Advanced Report Builder gives licensed users a complete reporting tool for creating complex reports to answer a variety of business needs. Advanced reports can be included in dashboards (see below).

  Note: The legacy reporting is still available, and customers who have created ARE reports or custom PPM reports can still access those reports.

Try it out

Give the new PPM Reports a "test drive" to see how easily you can create your own custom report.

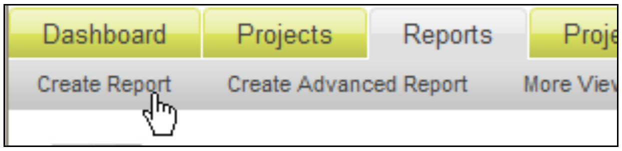
TO CREATE A REPORT:

1) In PPM, click the Reports tab to open the Reports application.

> **Tip:** If you do not see the **Reports** tab, click **See All** and select **Reports** from the list of all available PPM applications. If **Reports** is not listed, you may not have the appropriate permissions to access PPM Reports. See ***What You Need to Know About Reports*** below for more information.

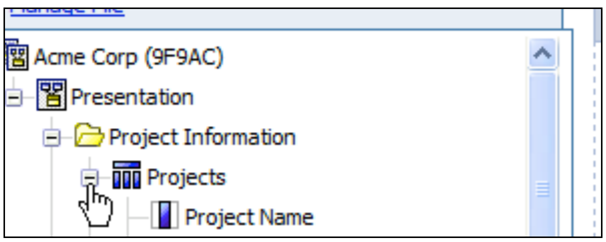
2) In the Reports application, click **Create Report** on the tab toolbar.
   Report Builder opens in a new window.

   Tip: If the window does not open, or if you see an error, make sure you have made the daptiv.com domain a trusted site in your browser so popup windows are not blocked. See ***What You Need to Know About Reports*** below for more information.



Tip: If you do not see the **Create Report** option, you may not be correctly licensed for Report Builder. See ***What You Need to Know About Reports*** below for more information.

3) In Report Builder, the Presentation Model represents the data from your enterprise. Expand the Presentation group, then expand the Project Information folder and expand Projects.

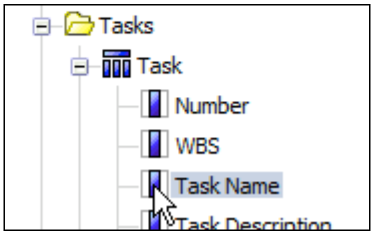


Tip: If the Presentation group is not visible immediately beneath your enterprise name, refresh the window.

4) Double-click **Project Type** to add it to your report. You can also drag it from the menu to the report unless you are using Firefox.
5) Add Project Name to your report by double-clicking **Project Name**. Project Type duplicates for each project of the same project type.
6) Click the Project Type column in your report and click the Group By button on the upper right toolbar (hold your mouse pointer over each icon to see a tooltip label):

Duplicate project types are removed when you group by **Project Type**.

7) Scroll down and open the **Tasks** folder in the **Project Information** folder. Expand the **Task** query subject and double-click **Task Name** to add tasks to your report.



Multiple tasks in a project cause the project name to be duplicated.

8) Group by Project Name: Select the **Project Name** column and click the **Group** icon to remove duplicate project names.

9) Select the **Task Name** column in your report, then scroll up in the Presentation Model to the Projects query subject and double-click **Phase** to add the project phase to your report between the **Project Name** and **Task Name** columns.

10) Select the **Task Name** column and double-click **Health** to add the project health to the report between **Phase** and **Task Name**.

11) Double-click on **Task Status** to add the task status after **Task Name**.

12) Add conditional formatting to mark any overdue tasks in red:

   a. Select the **Task Status** column.

   b. On the left menu, click **Change Layout**

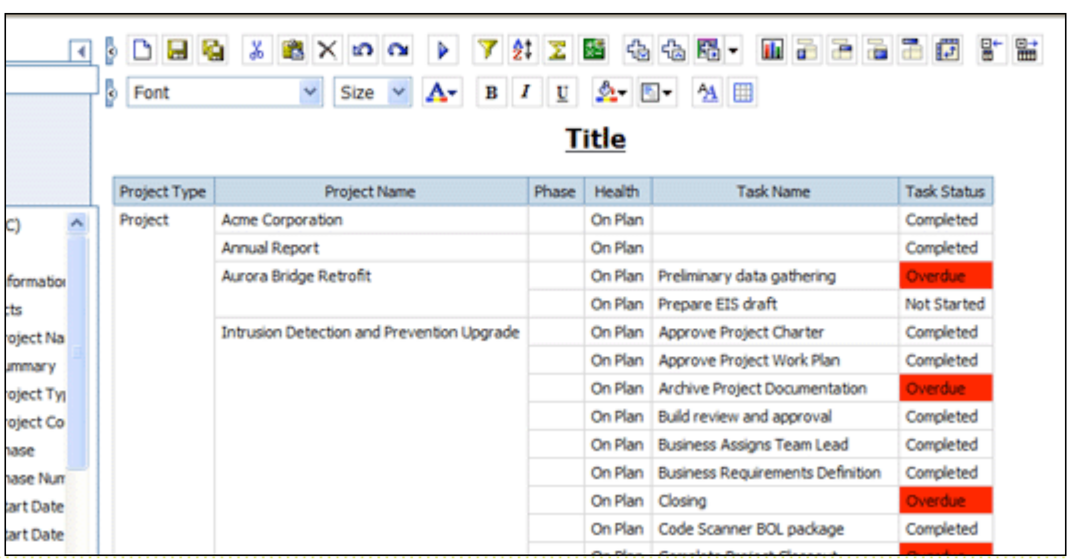
   c. In the Change Layout menu, click **Define Conditional Styles**.

   d. Click **Select Values**.

   e. Select **Overdue** and click **OK**.

   f. Click the **Edit** icon and **Font Color** and select Red, then click **OK**.

   g. Click **OK** to close the Define Conditional Styles dialog.
   The report displays with overdue tasks marked in red:



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13) Click the **Save** icon to save the report.

a. In the **Name** field, type **Overdue Tasks** as the name for the report.

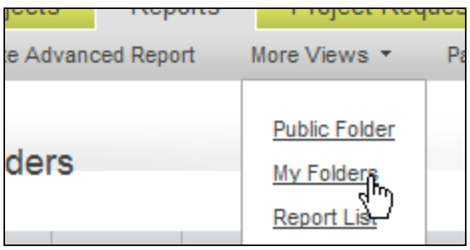
b. In the Description box, type Overdue tasks highlighted in red.

c. By default the report is saved in your **Public Folders**. Click **Select My Folders** to change the location to your personal folders.

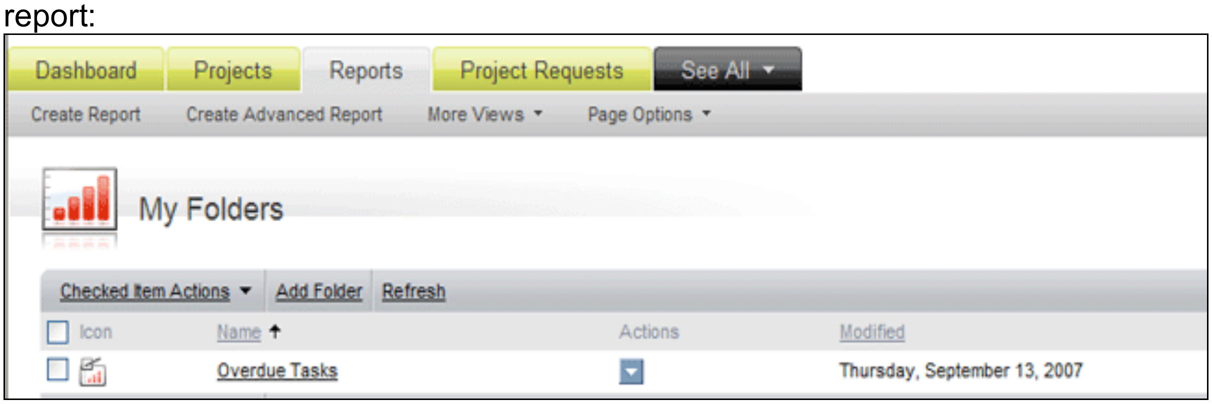
d. Click **OK** to save the report to your folders.

14) Close the Report Builder window.

15) In the main PPM window, on the Reports tab, click **More Views** and **My Folders**.



A list of reports in your folders displays, including the new Overdue Tasks report:



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What You Need to Know About Reports

Be aware of the following when using the new PPM reporting capability:

- **Popup Windows:** PPM uses popup windows and you must enable pop-ups for the Daptiv.com domain in order to use PPM and Reports.
- **Licensing:** You need to be licensed to use Report Builder or Advanced Report Builder. If you do not have a license, you will not see options to Create Report (opens Report Builder) or Create Advanced Report (opens Advanced Report Builder).
- **Presentation Model Refresh:** When you first open Report Builder or Advanced Report Builder, the Presentation model may not correctly display. Refresh the window to display the Presentation Data model.
- **PPM Session Timeout:** Your PPM session may time out while you are creating a report in Report Builder or Advanced Report Builder. You will notice this when you close Report Builder and try to navigate in PPM – you will be prompted to log in again. This should have no impact to your reports (any saved reports are saved and accessible once you log in again).
- **Firefox Browser Limitations:** Firefox is not supported in Advanced Report Builder. Firefox is supported in Report Builder but does not allow you to use drag-and-drop to add items to a report.
- **Data Model:**
  - As a "best practice" you should use data items from only one top-level folder in any one report (don't mix items from multiple folders). The model is designed to minimize the need to include data from multiple top-level folders. If you need to include data from multiple top-level folders, use Advanced Report Builder and the **Join** feature.
  - Reporting on Project Types will only return types from which projects have been created (so any types that are not currently used do not show up)
  - Reports that include Tasks, Task Number, or Task WBS will take some time to generate due to the functions required to extract the data from the database.
  - **Run with Options** and selecting **View as Excel 2000** or **View as Excel 2002** may result in blank output due to IE security settings. By default security settings block ActiveX controls from loading in the browser. The work-around is to hold down **Ctrl** key while page loads.
  - **Run with Options** and selecting **View as CSV** may result in no output due to IE security settings. By default security settings block ActiveX controls from loading in the browser. The work-around is to hold down **Ctrl** key while page loads.

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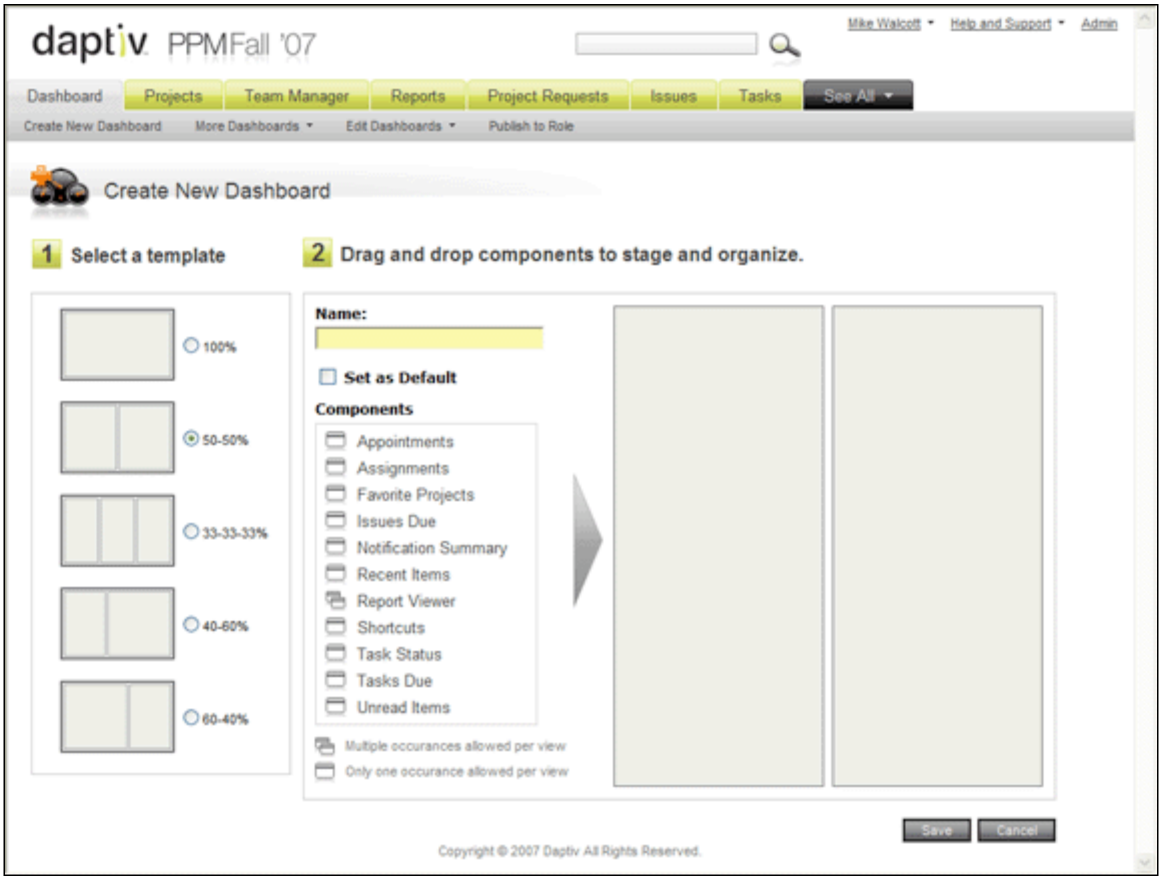
Dashboards

- **Customizable Dashboards**—The newly designed Dashboards give users the ability to customize and save multiple dashboards using a new drag-and-drop interface.
- **Multiple Dashboards**—Users can create and edit multiple dashboards and select a default, allowing them to switch between dashboards for different situations and needs.
- **Reporting Dashboards**—A Report Viewer dashboard pane allows you to include reports in your dashboards.
  To include the reports in dashboards you need the ***Report Viewer*** permission. By default all enterprise roles have this permission.
  Note: This permission is ***off*** for upgrading customers. Administrators need to edit each enterprise role to enable the Report Viewer for users.
- **Publishable Dashboards**—Users with appropriate permissions can publish their dashboards to specific enterprise roles.
  To publish a dashboard you need the ***Share Dashboard*** permission. By default, users with an enterprise role of Administrator, Executive, Resource Manager or Project Manager have the ***Share Dashboards*** permission.
  Note: This permission is ***off*** for upgrading customers. Administrators need to edit each enterprise role to enable sharing (publishing) of dashboards.

Try it Out

TO CREATE A DASHBOARD:

1) Open the global **Dashboard** application.
2) Click **Create New Dashboard** on the Tab Toolbar.
   The **Create New Dashboard View** screen displays.



The Create New Dashboard View screen includes 2 areas:

- **Template list**—This includes the layout templates you can choose from when designing your new dashboard. When you select a template, the other areas of the screen are activated.
- **Components lists and Organizing stage**—Choose dashboard components (panes) for the new dashboard from the component list and drag them to the organizing stage where you can order them as you want.

3) Give your dashboard a name and if you want it to be your default dashboard, select **Set as Default**.

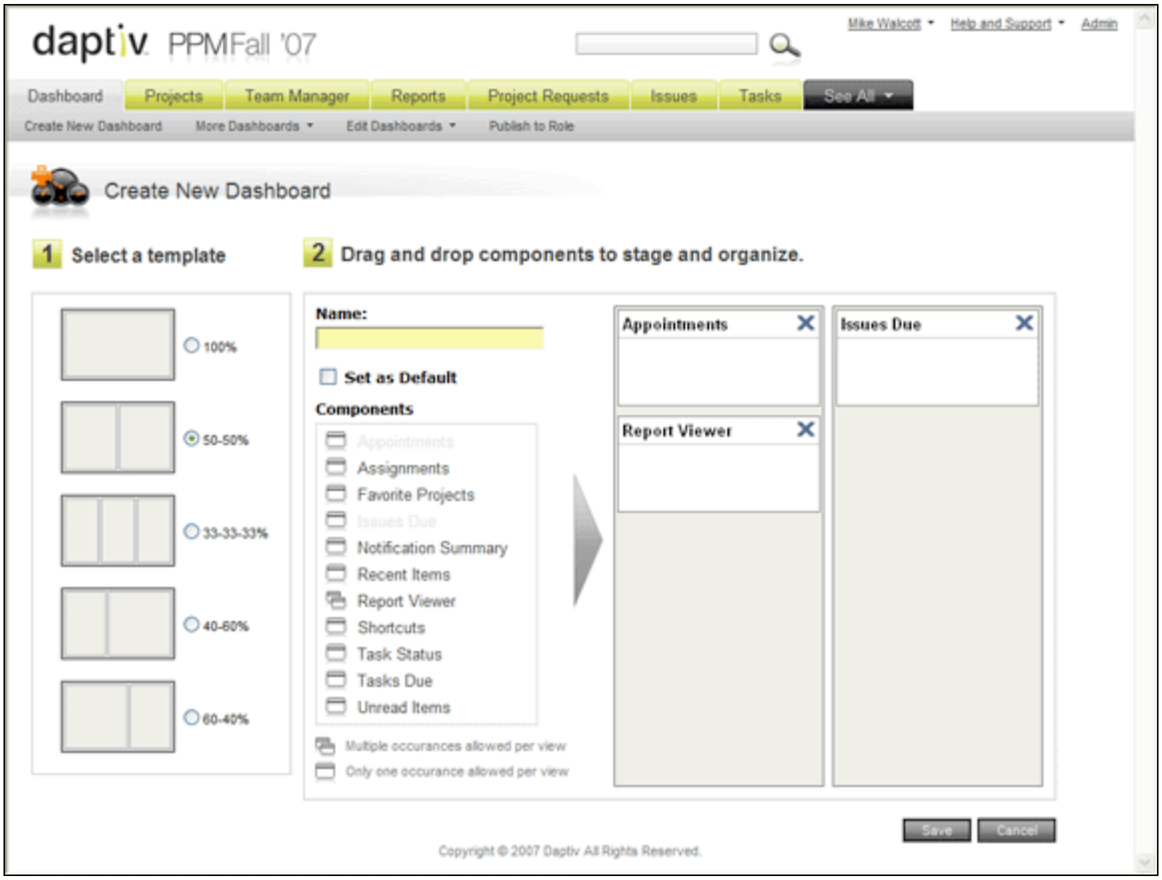
4) Select a layout template for the new dashboard from the template list. To select a template, click the template. A check appears in the box next to the template.
When you select a template, the other areas of the screen are activated.
Select components (panes) you want to include in the dashboard:

- Some panes, such as **Appointments** and **Favorite Projects**, can only be included once in any single dashboard. These components have this icon:

When you drag one of these panes to the organizing stage, the component is grayed out in the list (you cannot add it again). You can include as many different panes as you want, but each pane can only be included once on each dashboard.

- Other components, like **Report Viewer**, can be included multiple times in a dashboard and are marked with this icon: 
Drag the Report Viewer to the organizing stage one or more times. The viewer is empty until you add a report to it. You add a report after you save the dashboard.

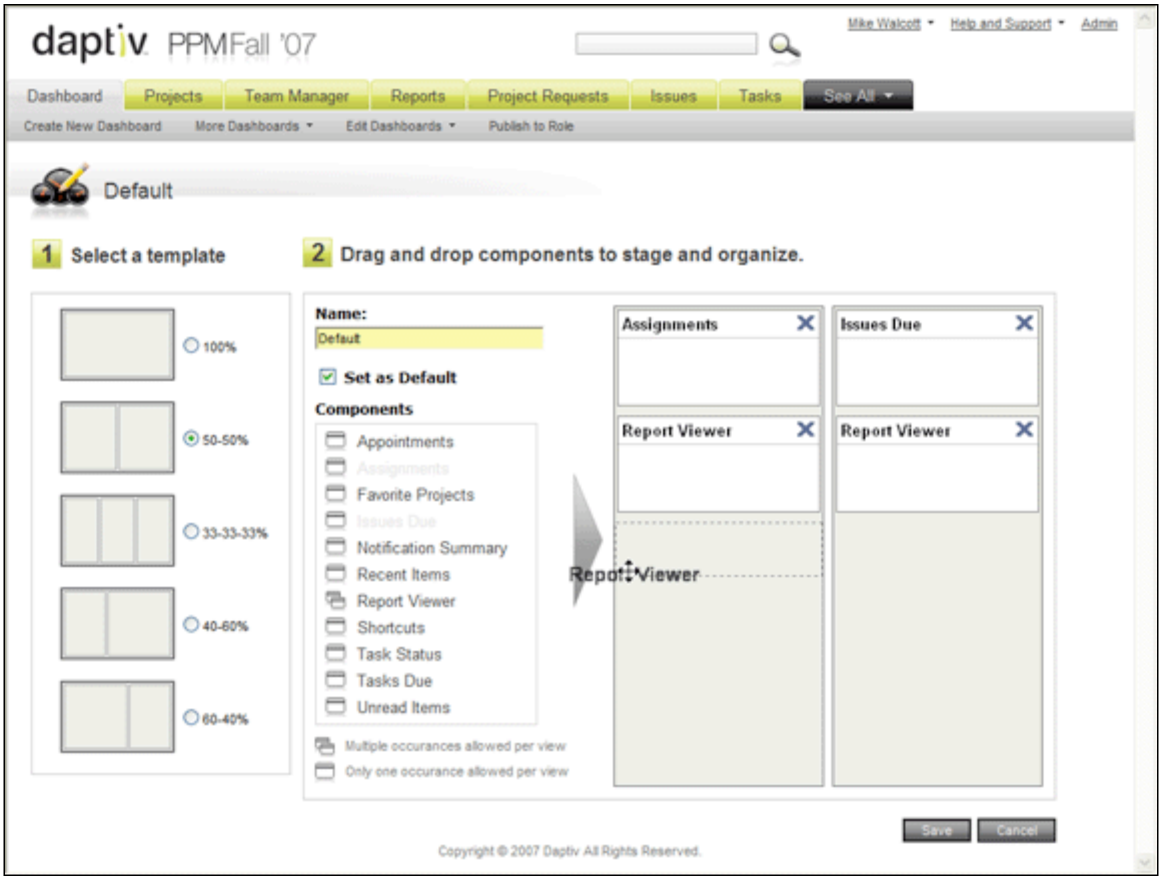
5) Use the organizing stage to create the layout for your dashboard.
   - Drag components to different locations to reorder them.
   - Select a different layout template to see different organizing options.
   - Delete an unwanted component by clicking the Delete icon on the upper right corner of the component.



6) Click **Save** to save the new dashboard and return to the dashboard page (the new dashboard is automatically displayed). To discard the new dashboard, click **Cancel**.

TO ADD A REPORT TO YOUR DASHBOARD:

1) Open the Dashboard application.
   The Dashboard displays.
2) Add the Report Viewer to your dashboard by editing the dashboard or creating a new dashboard and dragging the Report Viewer into the dashboard



3) Save the dashboard with the empty Report Viewer.

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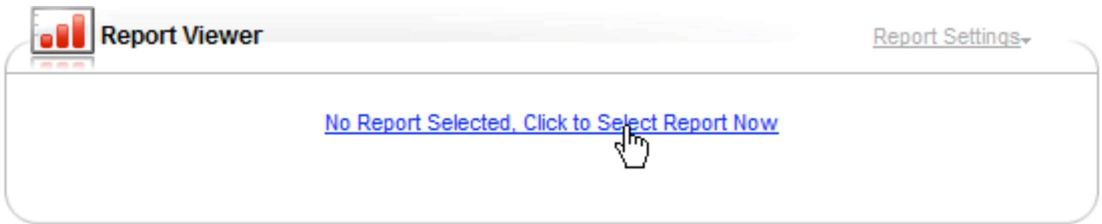
4) On the dashboard, click **No Report Selected. Click to Select Report Now** in the Report Viewer.
A list of available reports in the Public Folders displays.



5) Select a report from **Public Folders** or a subfolder, or click **My Folders** and select a report from your Personal Folders, then click **Select** to select the report.
The dashboard displays the selected report in the Report Viewer.

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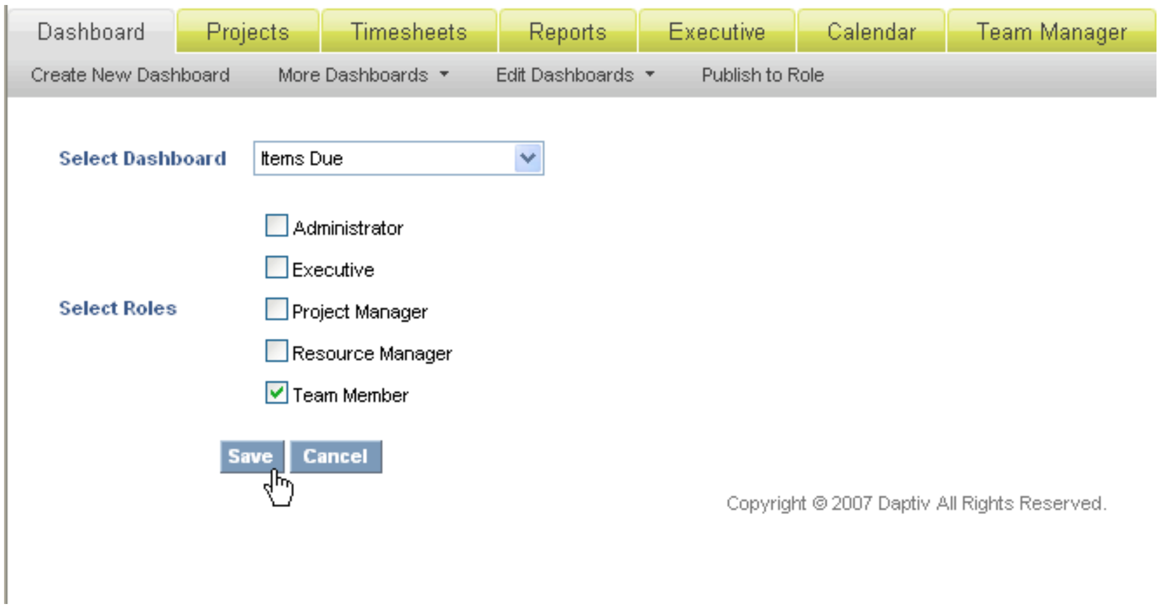
TO PUBLISH A DASHBOARD TO OTHER USERS:



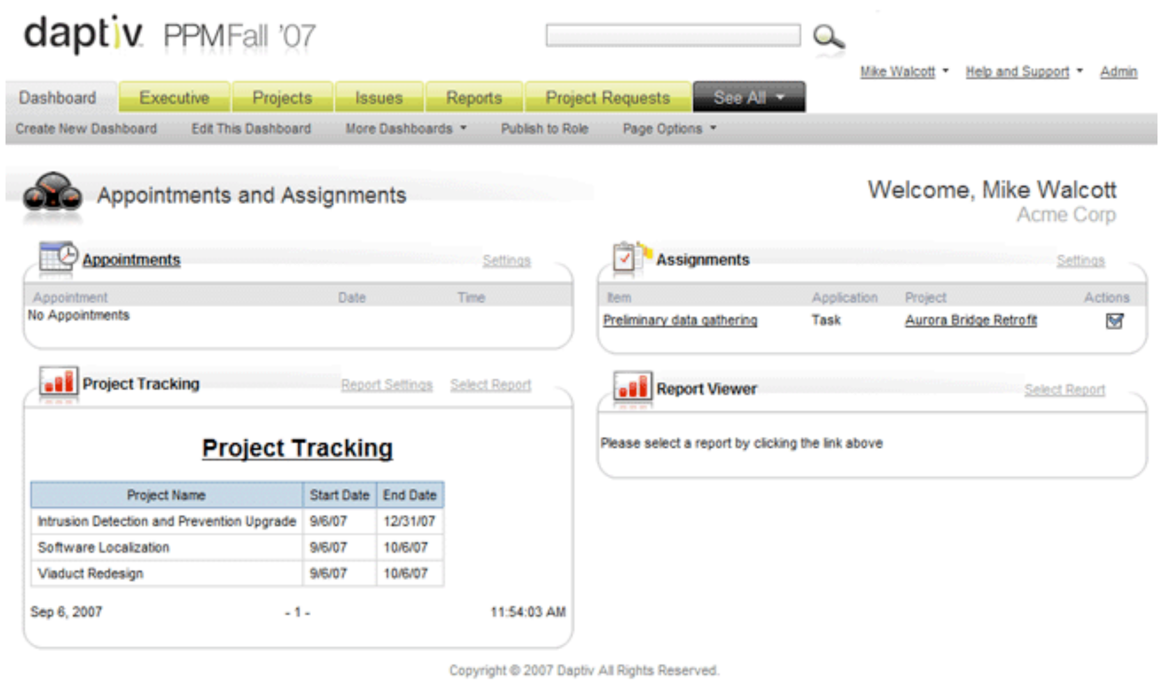
1) Open the global Dashboard application.
2) Click **Publish to Role** on the tab toolbar.
   Note: This option only appears if you have permission to share dashboards.
3) From the **Select Dashboard** list, click the name of the dashboard you want to publish.
4) From the **Select Roles** group, click one or more enterprise roles to which you want to publish the dashboard.
   Users with the role(s) you select will see the dashboard listed in their **More Dashboards** option.
5) Click **Save** to publish the dashboard to users of the role(s) you selected, or **Cancel** to cancel the publication.

What You Need to Know About Dashboards

Be aware of the following when using the new PPM Dashboards:

- **Report Loading:** When you open a dashboard (for example, by clicking on the Dashboard tab), any reports that are included in the dashboard will load. The load time varies depending on the number and type of reports. You can navigate away from the dashboard without waiting for all reports to load.

User Interface Refresh

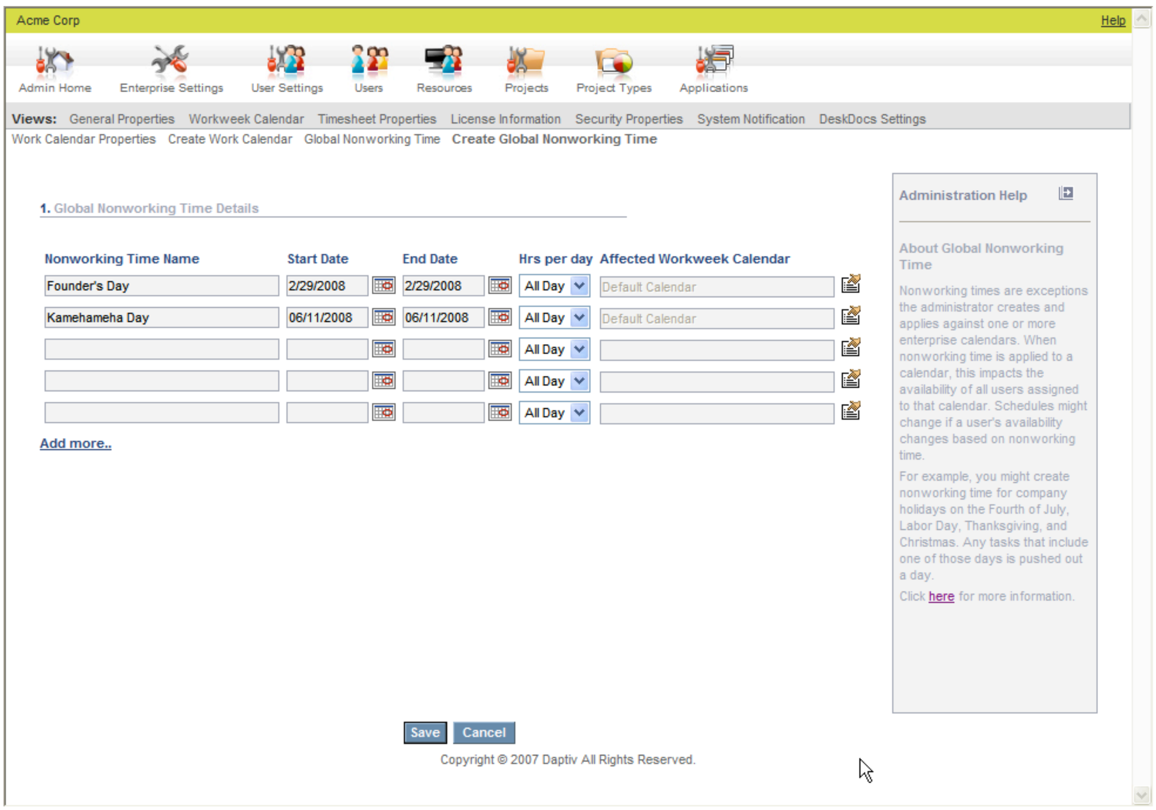


- **New Look for PPM**—The newly redesigned PPM UI provides a clean and quick interface for both new and experienced users. New icons, screen layouts and colors make it easy to navigate and to perform tasks.

Nonworking Time

- Nonworking time can be added to enterprise workweek calendars and to specific users to limit availability when scheduling tasks. Nonworking time events are exceptions to availability and can impact an entire organization or individual users:

  - **Global nonworking time**—Administrators can create global nonworking time for an enterprise, adding time for company-wide holidays and other special events.



  - **Personal nonworking time (Beta feature)**—Resource managers can create personal nonworking time events for individual users, creating exclusions for specific instances when a user is not available (for example, a vacation or a non-work appointment).

    Nonworking time is taken into account when tasks are scheduled. Existing schedules that are impacted by newly created nonworking time are not automatically adjusted for the exclusion, but project managers are prompted with the option to have the schedule readjusted. For more information about nonworking time, see the PPM Online Help.

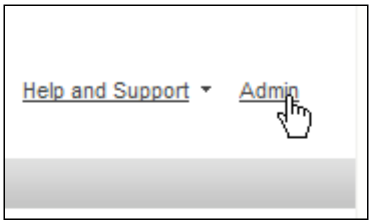
Try it out

Give the new Nonworking Time feature a “test drive” to see how you can create enterprise-specific nonworking time and how it impacts project schedules.

Note: This assumes you have access to the Administrative Console and have projects in your enterprise with existing tasks assigned to project members.

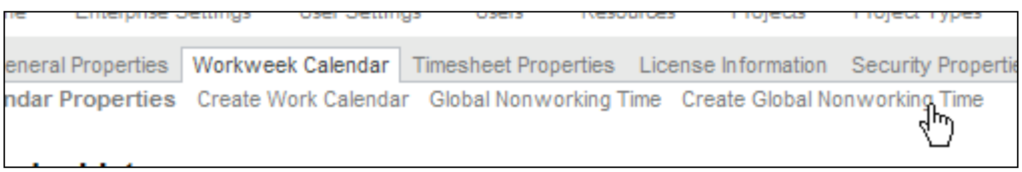
TO CREATE GLOBAL NONWORKING TIME:

1) In PPM, click on the **Admin** link to open the Administration Console.



Tip: If you do not see the Admin link you do not have administrative permission in your enterprise. See ***What You Need to Know About Nonworking Time*** below for more information.

2) Under Enterprise Settings, click **Workweek Calendar** and **Create Global Nonworking Time**:



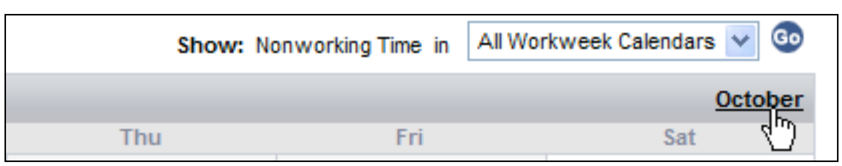
The Global Nonworking Time Details screen displays.

3) Type the details of a new nonworking time event. For example:
   a. In the **Nonworking Time Name** box, type **Christmas Day**.
   b. Click the calendar icon next to the **Start Date** box and select **December 25**.
      The Start Date and End Date are automatically set to **12/25/2007**.
   c. By default the **Hrs per day** value is set to **All Day**.

   d. Click the **Edit** icon to select a workweek calendar to which you want to apply this nonworking time:

   e. Select one or more workweek calendars from the **Select Workweek Calendar** window and click **Apply** to apply the nonworking time to the selected calendar(s).
      Note: If you have not created any workweek calendars for your enterprise the only calendar is **Default Calendar**.
   f. Click **Save** to save the nonworking time and close the Nonworking Time Details window.
      The Global Nonworking Time screen displays (defaulting to the current month).

4) On the Global Nonworking Time window, click the month link to change the display to a month that includes nonworking time you created:



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5) The calendar displays any nonworking time that occurs during that month:

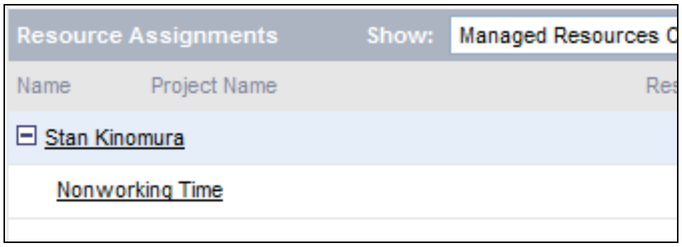
TO CREATE PERSONAL NONWORKING TIME (BETA FEATURE):

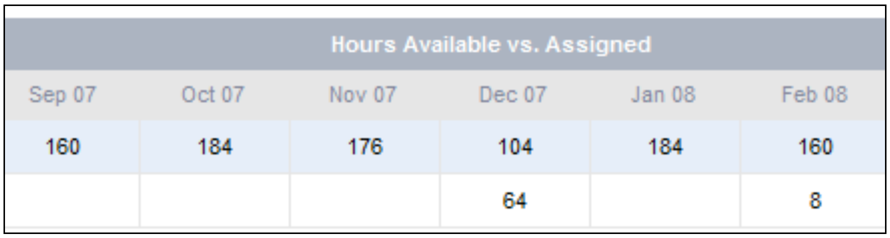
1) In PPM, click on **Team Manager** to open the Team Manager application:

> **Tip:** If you do not see the Team Manager tab it may be hidden (click **See All** to see a list of application tabs that are not displayed) or you may not have adequate permissions to access Team manager. See ***What You Need to Know About Nonworking Time*** below for more information.

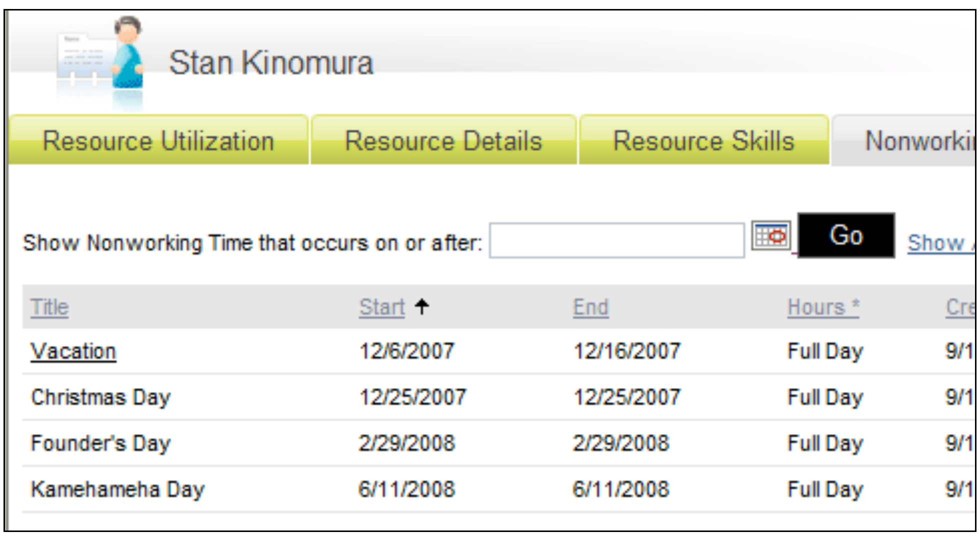
2) In Team Manager, click the name of a user to open the Resource Details window.
3) Click the Actions tab and **Create Personal Nonworking Time**.
   The Create Personal Nonworking Time window opens.
4) Type the details of a new personal nonworking time event. For example:
   a. In the **Nonworking Time Name** box, type Hawaii Vacation.
   b. Click the calendar icon next to the **Start Date** box and select November 5.
      The **Start Date** and **End Date** are automatically set to 11/5/2007. Type **11/16/2007** in the **End Date** box, or use the calendar icon to change the date.
   c. By default the **Hrs per day** value is set to **All Day**.
   d. Click the **Edit** icon to assign the personal nonworking time to specific users.
      Only users for whom you are a supervisor or a resource manager are listed.
   e. Select one or more users from the **Select Users** window and click **Apply** to assign the nonworking time to the selected user(s).
   f. Click **Save & Close** to save the nonworking time and close the Create Personal Nonworking Time window.
      The Global Nonworking Time screen displays (defaulting to the current month).

5) In Team Manager, under Resource Assignments, you can click the plus (+) icon next to a resource name to see their availability. Any nonworking time is listed beneath their name and the hours are subtracted from their available hours:





6) Click the **Nonworking Time** link beneath the resource name to open a Resource Details window with details of any nonworking time that applies to the resource:



7) You can open and manage the details of personal nonworking time by clicking the name of the nonworking time event.
   Note: You can only open details for personal nonworking time. You must be an administrator to manage global nonworking time.

8) Users can view nonworking time that impacts them on the global or project calendars.

9) Project managers can view nonworking time for all their project members on the project calendar.

> **Tip:** If you have a project-level role of project manager and do not see nonworking time for your project members, you may not have the ***View All Nonworking Time for all Project Members*** permission. See ***What You Need to Know About Nonworking Time*** below.

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What You Need to Know About Nonworking Time

There are a few aspects of nonworking time that you should keep in mind:

- **Creating Global Nonworking Time:** Administrators have to create global nonworking time. Non-admin users do not have appropriate permissions to access the Administrative console and create global nonworking time.
- **Creating Personal Nonworking Time:** This is a **Beta Feature**. Resource managers and supervisors have to create personal nonworking time. Individual users do not have adequate permission to create their own personal nonworking time.
- **Access to Team Manager:** You must have access to the Team Manager application in order to create personal nonworking time for users you manage. Resource Managers and Supervisors have permission to Team Manager by default.

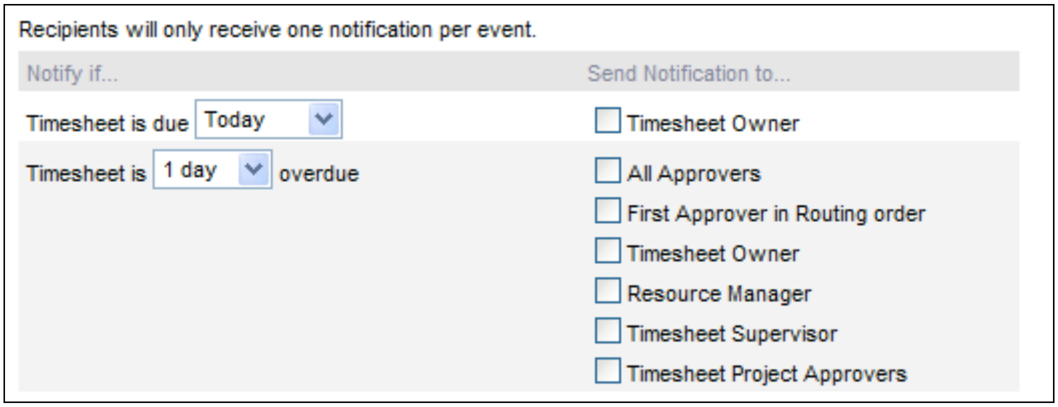
- **Impact to Tasks**:
  - When a task is created, any applicable nonworking time is taken into account with regard to the task schedule.
  - When new nonworking time is created and impacts existing tasks, the task schedules are not adjusted but project managers are notified on opening their projects that nonworking time has impacted the schedule and a prompt offers the option to create a baseline and automatically adjust the schedule:

    If the project manager chooses to have the schedule adjusted, a baseline is created and the schedule adjusted for the nonworking time.
    If the project manager chooses NOT to have the schedule adjusted, no changes are made. However,
  - If an affected task is edited, the schedule for that task is *automatically readjusted* based on any applicable nonworking time, even if the project manager has elected to **NOT** readjust the schedule.
  - If imported tasks are affected by nonworking time, the task schedule is not adjusted but project managers are notified on opening their projects that nonworking time has impacted the schedule and a prompt offers the option to create a baseline and automatically adjust the schedule.

- **Impact to Resource Availability**:
  - Nonworking time is subtracted from resource availability.
    Resource availability can be viewed from Team Manager, Capacity Planner, Resource Utilization, and on the Gantt Chart Scheduled Time View (global nonworking time only in Gantt Chart).
  - Individual users can view global and personal nonworking time that impacts them on the global and project calendars.
  - Project managers can view nonworking time for their team members in the project calendar (only if the project manager has the ***View Nonworking Time for all Project Members*** permission).
  - The ***View Nonworking Time for all Project Members*** permission must be manually enabled for upgrading customers. This is a project role-level permission for the Calendar application and must be enabled by an administrator.

Timesheets Notifications

- **Improved support for timesheet notifications**
  Administrators can configure new timesheet notification options:
  - **Timesheet Due**—A notification can be sent to a timesheet owner when a timesheet is due.
  - **Timesheet Overdue**—A notification can be sent to one or more of the following when a timesheet is overdue: timesheet approvers, timesheet owner, resource manager and supervisor. The overdue time trigger for the notification is configurable.



For more information, see the PPM Administrator Online Help.

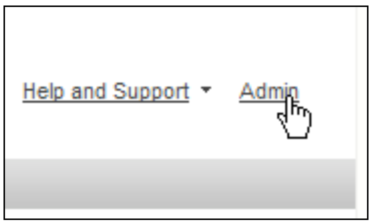
Try it out

Give the new Timesheets Notifications feature a “test drive” to see how you can use the automatically generated notifications to improve your organization workflow.

Note: This assumes you have access to the Administrative Console and have users in your enterprise.

TO CONFIGURE TIMESHEETS NOTIFICATIONS:

1) In PPM, click on the **Admin** link to open the Administration Console.



Tip: If you do not see the Admin link you do not have administrative permission in your enterprise. See ***What You Need to Know About Timesheet Notifications*** below for more information.

2) Under Users, click **User List** to open the list of enterprise users.
3) Use the Quick Filters to filter the list to show only those users for whom you want to enable Timesheet Notifications, then select the users and click **Checked Item Actions** and **Bulk-Edit Users**.

See **Bulk-Edit User List** below for information on how to use the Quick Filters and Bulk-Edit.

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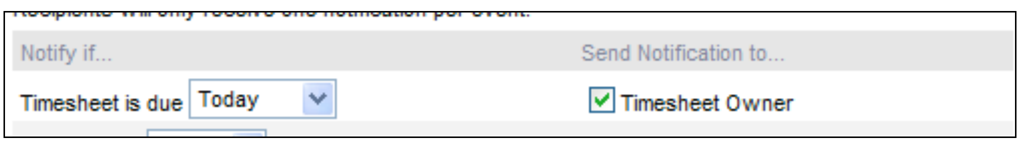
4) From the **Timesheets Required** list, select **Yes**.

Tip: Timesheets notifications are only applicable if the Timesheets Required setting set to **Yes**. This setting only impacts Timesheets Notifications. It has no impact on the availability of the Timesheets application to users. See ***What You Need to Know About Timesheet Notifications*** below for more information.

5) Click **Admin Home** and under Enterprise Settings click **Timesheet Properties** to open the Timesheet Properties page. Click Timesheet Notification Settings.
6) Configure a reminder notification for the timesheet owner:
   a. From the **Timesheet is due** list, select the point at which you want a reminder notification sent to the timesheet owner. Options range from one week before the timesheet is due to the day the timesheet is due.

      Note: You can only send one reminder notification.
   b. Under **Send Notification to** click **Timesheet Owner** to send a notification to the owner when a timesheet is due.



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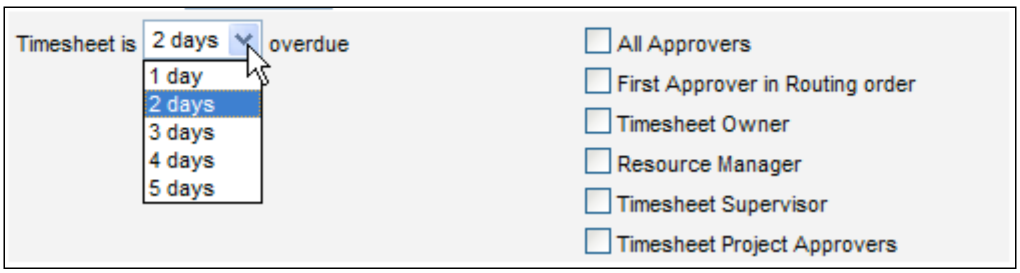
7) Configure an overdue notification:

   a. From the **Timesheet is <n days> overdue** list, select the point at which you want a notification sent about an overdue timesheet. Options include 1, 2, 3, 4 or 5 days overdue.

   b. Select one or more recipients to receive the overdue notice.
   If you select the timesheet owner, they receive an individual notification when the timesheet is overdue the number of days you selected.

   If you select approvers, managers and/or supervisors, they receive a bulk notification containing information about all the users they manage or whose timesheets they approve.



8) Click **Save** to save the Timesheet Notifications settings.

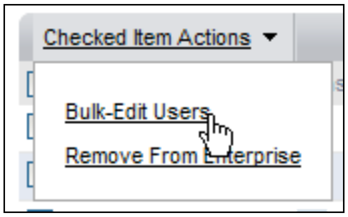
What You Need to Know About Timesheets Notifications

There are a few aspects of timesheets notifications you should keep in mind:

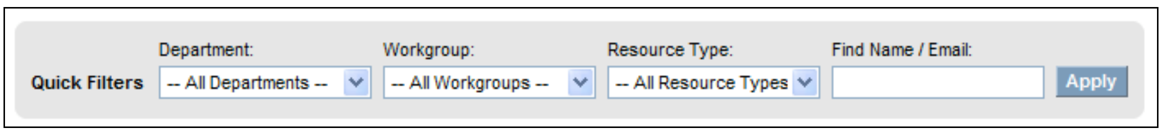
- **Timesheets Required:** Timesheet notifications are only sent if a user has the **Timesheets Required** setting configured to **Yes**. Administrators need to edit users to set this value. By default the Timesheets Required setting is No.
- **Bulk Overdue Notifications:** Approvers, managers and supervisors who are configured to receive overdue notifications receive a bulk notification about all their resources with an overdue timesheet in the current period.

Bulk-Edit of Users (Administration Console)

- Administrators can now bulk-edit most user fields, allowing them to quickly make changes to user records.

  Bulk-edit is available on the **User List**, **Inactive Users** list, **External Resources** and **Inactive External Resources** lists. For details, see the PPM Administrator Online Help.
- **Quick Filters on User Lists** (Administration Console)
  The users lists now include quick filters to restrict the list to those users you want to view.

  Quick filters are available on the **User List**, **Inactive Users** list, **External Resources** and **Inactive External Resources** lists. For details on using the quick filters, see the PPM Administrator Online Help.

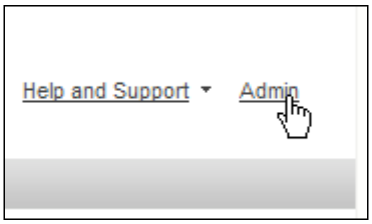
Try it out

Give the new Bulk-Edit User and Quick Filters features a "test drive" to see how they can speed your administration of enterprise users.

Note: This assumes you have access to the Administrative Console and have users in your enterprise.

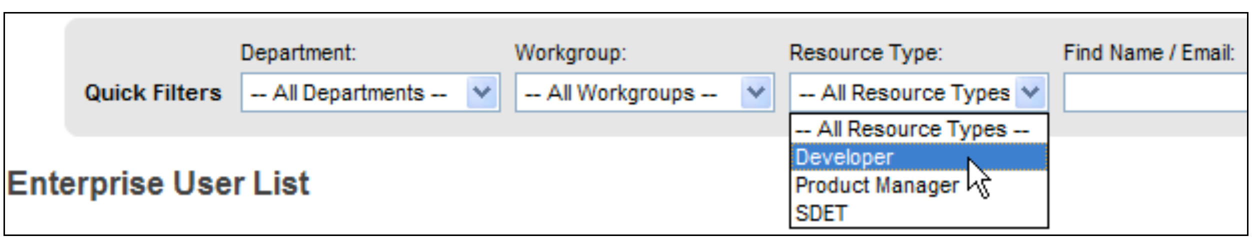
TO BULK-EDIT USERS:

1) In PPM, click on the **Admin** link to open the Administration Console.



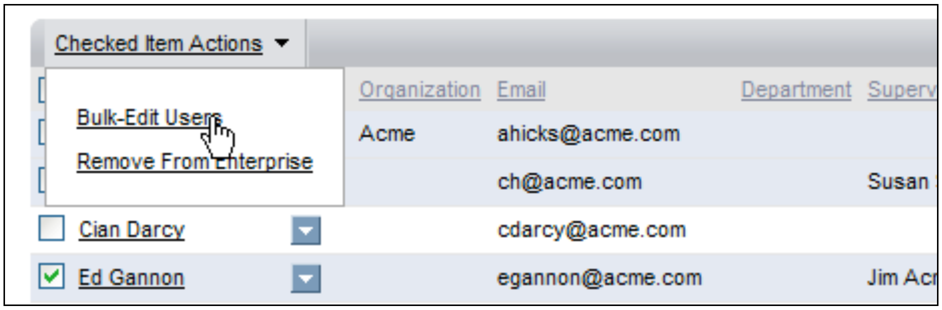
> **Tip:** If you do not see the Admin link you do not have administrative permission in your enterprise. See ***What You Need to Know About Bulk-Edit*** below for more information.

2) Under Users, click **User List** to open the list of enterprise users.
3) Use the Quick Filters to filter the list to show only those users for whom you want to make a bulk change. For example, if you have users with a particular resource type that you want to enable Timesheet Notifications, select that resource type from the **Resource Type** list and click **Apply**. The list of users is filters to show only those users with the resource type you chose:



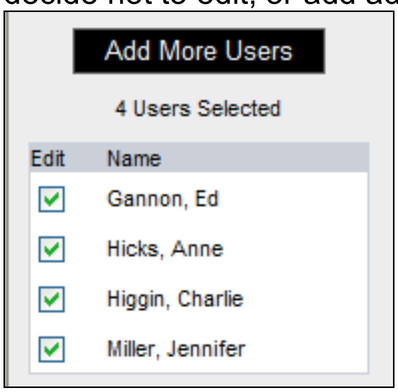
> **Tip:** You can type a partial name or email address in the Find Name / Email box to limit users whose name or email address contains the string. See ***What You Need to Know About Bulk-Edit Users*** below for more information.

4) Select the users you want to edit and click **Bulk-Edit Users** from the **Checked Item Actions** list:

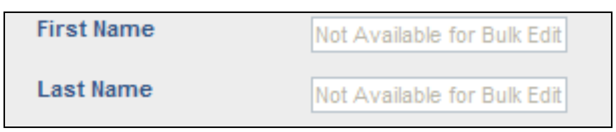


The Bulk-Edit window opens.

5) Selected users are listed in the user list. You can unselect any user you decide not to edit, or add additional users by clicking **Add More Users**:



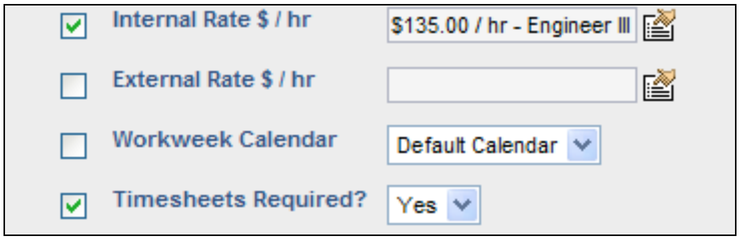
6) In the Bulk-Edit User window, fields you cannot bulk-edit are marked **Not Available for Bulk Edit**:



7) Fields you can bulk edit are blank or have a default value displayed. To bulk edit a value:

   a. Type the value you want all selected users to have, or select the value from the list (if applicable).

   b. When you make a change to any field, the field is automatically selected:



> **Important:** If you clear the checkbox for the field, any edit you made of that field is not saved.

8) Click **Save** to save your edits and close the Bulk-Edit User window.

What You Need to Know About Bulk-Edit Users and User Quick Filters

- **Changing Administrator Role:** You cannot change user enterprise roles so that you have no user with the Administrator role.
- **Quick Filters Remain Active:** Any filters you set for a particular list of users remain active throughout your PPM session until you reset the filters by changing them and clicking **Apply**.

Known Issues for PPM Fall '07

Reports –

- Mixing query items from different folders may cause unpredictable results If you need to include query items from different main-level folders, use Advanced Report Builder and create a Join relationship between queries.
- You need to enable popup windows to use Report Builder or Advanced Report Builder
- You have to be licensed as a Report Author to have access to Report Builder or as an Advanced Report Author for access to Advanced Report Builder
- Your PPM session may timeout while working in Report Builder or Advanced Report Builder window. This should not impact creating/saving reports, but requires login when returning to PPM
- ID fields do not display in reports. This is by design. IDs are included in the data model to allow you to separate items with identical names (they will have different IDs) by grouping on the ID field.

  Note: If you require a displayed ID you can use Advanced Report Builder and the CAST function to convert the field from a binary data type to a viewable data type.
- The Project Requests query subject includes only project requests and projects generated from project requests.
- If a report references a custom field that has been deleted in PPM, running the report generates an "***expression parsing***" error. To correct this, open the report in Advanced Report Builder and remove the non-existent custom field.
- If you create an drill-through (click-through) chart with the target set to display XML, clicking the chart will result in a "***Content Manager did not return an object***" error. To prevent this, the target should be set to display HTML.
- **Report Builder**
  - Report Builder doesn't support drag-and-drop in Firefox
  - In Report Builder, if you create a report using query items from **Task Details** (in **Project Information | Tasks**) and do not include **Task Work Hours**, the report will only display tasks for which actual work has been entered. To include all tasks in the report, add **Task Work Hours** to the report.

- **Advanced Report Builder**
  - Advanced Report Builder doesn't support Firefox
  - In Advanced Report Builder, if you open and attempt to save a Report Builder report to the same name and location, a "***Replace Operation Failed***" error displays. To save a Report Builder report in Advanced Report Builder, change either the name or the location of the report you are saving.
  - When opening Advanced Report Builder, if you are prompted to allow the webpage access to your clipboard, click **Allow access**. This prompt is a result of Internet Explorer 7 security settings. For more information, see the Online Help.

Dashboards –

- You must have the ***Report Viewer*** permission in order to see/add/use the Report Viewer Dashboard component.
- You must have the ***Share Dashboards*** permission in order to see the Publish Dashboard link.
- Dashboards with more than 4 reports on them may load slowly. You can always click to another tab, even if the reports have not displayed. To avoid slow dashboard load time, limit each dashboard to 4 reports or fewer.

Nonworking Time –
IMPORTANT: Personal Nonworking Time is a Beta feature

- You must have the ***View All Nonworking Time for all Project Members*** permission in order to see for nonworking time for project members in the project calendar
- Editing an impacted task readjusts the schedule for that task, even if you elected *not* to readjust your project task schedule.
- Imported tasks are not automatically adjusted based on nonworking time. If an imported task is impacted by nonworking time, the project is flagged and the project manager has the option of having the schedule readjusted.
- Nonworking time names should not include the ampersand ("&") symbol.

Timesheets Notifications –

- Users must have the **Timesheets Required** setting configured **Yes** in order for notifications to apply (**Note:** This is a great opportunity to try out bulk-edit)

Bulk User Edit –

- The Quick Filters remain in effect until you clear them or start a new PPM session

Utilities –

- **ProjectTransit** – ProjectTransit users will be prompted to upgrade their ProjectTransit version. Until they upgrade they will not be able to sync PPM projects with Microsoft Project files.
- **Outlook Integration** – Outlook Integration users will need to upgrade their Outlook Integration version. To do so they first must uninstall the existing version. There is no message prompting users to update Outlook Integration.

Web Forms –

- **Existing (pre-PPM Fall '07) Web Forms** – You need to regenerate any existing web forms you had prior to PPM Fall '07 due to the update of the PPM user interface. Older web forms will not look correct until you regenerate them. **Note:** This impacts static web forms like project request web forms.