

Principal Toolbox®

RELEASE NOTES

Version 4.2

These notes provide an overview of the changes in the Principal Toolbox® in respect to the previous release.

New Features and Major Changes:

Feature	Description
Baseline support	Planning data projects is now supported by two baselines: initial and current. Baselines can be set by the project manager on the project plan and become available for reporting and is shown on the Gantt.
7-day Gantt and Resource planning	Both the Gantt as well as the Resource planboards now support 7-day views. Weekend days are shown in grey but plannign can be set for these days.
Project tabs re-ordering	The tabs on the project have been renamed and re-order. One major change is the naming of the 'custom' tab which has now been named 'properties' and includes all project properties both standard and custom.
History tracking on log items and portfolio items	Log items (issues, risks etc.) as well as portfolio items have been extended to support history information (separate tab) for tracking wha was done and by whom.
Email notifications on time sheets, requests etc.	Email notifications when something becomes overdue have been implemented. By default, most of the notification are switched off.
Document links	It is possible to have document links within the application. This allows for a centrally placed template to be linked to from projects. As such, it is possible to update all templates used at projects by updating only the centrally placed document.
Timeline reporting	All entry-based information (hours, costs) can be reported over in time. This allows to generated matrices and time charts that indicate their values in time.
Person reporting	At various locations within the tool a report can be created on person/member information.
Multi-currency support	The multi-currency support has been extended to allow different currencies within a single project. The project administration can still be done in a so-called local currency next to the global currency. Also, the currency rates can be imported via the Integration Dashboard.
Discussion log on log items	On log items, it is now possible to add discussion messages. On these messages, the author and date is registered.

SIMPLY FORTES.



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Add-ons:

Feature	Description
Resource capacity planning * NEW *	A new add-on is launched to plan skill demand across the project organisation.
Resource allocation * NEW *	A new add-on is launched to plan resource demand across the project organisation.

Minor Changes and Fixes:

Nr	Version solved	Description
304826	4.1.5.3.4470	Table headers in RTF documents are now also correctly formatted in Microsoft Word 2007.
303887	4.1.5.3.4471	It's possible again to copy the Project management structure diagram to the clipboard.
304400	4.1.5.3.4471	Sending an email notification is no longer mandatory when creating a new user account.
303579	4.1.6.0.4477	Tables in generated RTF reports had badly formatted headers and rows when opening these documents in MS Word 2007. This was caused by additional RTF codes which were interpreted differently by Word 2007.
304644	4.1.6.0.4477	Corrected the display of the time sheet hours total, in some cases decimal hour totals were displayed with more than 2 digits accuracy.
305161	4.1.6.0.4478	Top level domain names consisting of more than 3 letters are now supported in email addresses.
304262	4.1.6.0.4479	In RTF reports the system setting (either default or custom) is used for language and localization, not the personal locale.
304409	4.1.6.0.4479	A document listing has been added to both the import task and the export task at the integration dashboard. These document listings enable sharing of import and export files without requiring access to file folders on the Principal Toolbox server.
304480	4.1.6.0.4480	Currency has been added as a standard field for automated reports on projects when the module local currencies is used.
305104	4.1.6.0.4481	The letter A is now used to indicate the action count in the header of listings (instead of the letter D). The action count column is now included in the built-in views for logs on a product.
305330	4.1.6.1.4491	The SOAP service is now initialized in such a manner that it can no longer cause problems during startup when the application location has been explicitly configured.
305754	4.1.7.0.4498	Products can now be pre-selected to be displayed on time sheets independent of the time entry configuration when the prerequisites of being a project member and the project not being archived are met.
305652	4.1.7.0.4498	Some additional measures have been taken to prevent the time sheet hours total to be incorrectly stored as 0.
305569	4.1.7.0.4503	Improvements have been made to prevent empty rows between organisational units in the navigation tree.
306331	4.1.7.1.4506	Changes were made in RTF reporting to prevent prevent errors in Word when using totals in views.
306334	4.1.7.1.4507	Changes have been made in reporting to prevent errors in Word when using totals in views for RTF reports.
307866	4.1.7.3.4515	Issues on MSP support have been solved regarding the MSP project name, calculations on

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		hours and costs within the programme to include the MSP project values.
307808	4.1.7.3.4515	It's now possible to view and add dependencies on products in a project model.
308070	4.1.7.3.4517	Changing or removing a project or programme reference on a portfolio item now automatically leads to the deselection of the portfolio item as key portfolio item on the previously referenced project/programme.
307947	4.1.7.3.4517	Actions now optionally refer to both a product and a log item (like issue, risk etc.). Previously, actions only referred to either a product or a log item and could only be changed to refer to a log item. ("Related to" field references only log items now, existing product references have been moved to the "product" field, this may affect reports)
307773	4.1.7.3.4525	Bij het aanmaken en bewerken van een portfolio item wordt de lijst met programma's en projecten nu dynamisch opgehaald op basis van invoer van de naam van het project/programma.
307864	4.1.7.3.4525	An option has been added to the custom field configuration which determines whether the field is to be shown by default on the custom page or property section of an object. The field remains available for use on custom pages and for reporting if and only if the option 'available for use' is ticked.
306528	4.1.7.3.4528	A new role has been added to portfolio management. The new "Member" role allows users to be granted access to the portfolio management dashboard but allowing only access to portfolios of which they are a member.
307772	4.1.7.3.4528	Using NTLM authentication using a shared directory ran into problems during the update when the configuration for this authentication mechanism was overwritten. This has been corrected by keeping the configuration active.
307454	4.1.7.4.4533	Actions can be related to products as well as log items (e.g. issues, risks). Previously the actions were related to either one of them. The product relation can be set afterwards as well.
309089	4.1.7.4.4533	Products that are finished will now always be displayed as finished in the "Final" column. Even when there are unfinished sub products (lower in the product breakdown hierarchy).
310119	4.1.7.6.4538	On the time entry level a new role has been added that allows to assign users the possibility to view and report on time entry related information. Previously this was only available to time entry coordinators.
306002	4.2.0.0.4485	During the software update several operations on the database are performed, that are critical to the correct operation of the Toolbox. These operations are performed in transactions, which means that SQL Server logs them in the transaction log. When SQL Server is unable to log, the update will fail. In order to make sure that SQL Server can, in all cases, perform the operations correctly, the transaction log must be able to grow at all times. This means that there must be sufficient free disk space on the database server machine. As a rule of thumb 4 to 5 times the current database size should be sufficient.
305911	4.2.0.0.4554	Cost/hour entries can be imported in respect to time registration groups and non-project activities (and their sets).
307262	4.2.0.0.4554	The time sheet report at the time entry dashboard now includes a filter option allowing filtering on time entry groups.
307736	4.2.0.0.4554	The hit/miss ratio on the cache of the application was limited to 21474836 hits after which an erroneous ratio was calculated. This limitation has now been increased to 2147483647 hits. Also the hit ratio is calculated differently now (number of hits divided by the number of hits and misses).

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307694	4.2.0.0.4578	Project details are now available again for guest users in Project Plaza.
306585	4.2.0.0.4587	The links for opening the keyword page and downloading the basic Excel template have been replaced by buttons on the listing of available automated reports.
307261	4.2.0.0.4601	Dependencies towards products that are not assigned within the project plan (or product checklist) are not shown within the Gantt. Previously they were shown as 'external dependencies'.
309085	4.2.0.0.4612	When resetting a custom field the calculation and/or condition configured at that field will now be removed.
309360	4.2.0.0.4616	On the edit project plan page, the headers for product breakdown, management products and work packages remain visible even when the list below is scrolled down.
307450	4.2.0.0.4617	The logging of import/export tasks on the integration dashboard now refers to the user that initiated the execution of the task as creator of the logging entry. For scheduled tasks this is the task owner.
309402	4.2.0.0.4617	When using the setting User name for person display names, no names will be visible. To correct this, change the setting to some other value, save the settings, and then choose User name again. Now the user names will be visible again.
308983	4.2.1.0.4702	Reports on portfolio management now shows issues, risks and actions related to programme's that are managed via a portfolio.
312996	4.2.1.0.4702	Besides PDF output of the Gantt chart, it is now also possible to generate an image file containing the Gantt. This facilitates including this image in your reports.
312995	4.2.1.0.4704	The Gantt pdf-file now contains the project name and date of print. Also, it has become possible to select the time scale for the pdf.
310786	4.2.1.0.4711	The options for filtering on programmes has been extended to allow for filtering on the current applicable programme.
313226	4.2.1.0.4711	Log items like issues, risks, changes etc. can be moved between projects in the same programme if the user has access to the destination project. Previously this could only be done via the programme level and programme manager.
313025	4.2.1.0.4712	On creating a portfolio item, it is possible to directly create a project at an existing programme. On existing portfolio items it is also possible to create a project within an existing programme. This new option provides the possibility to 'assign' new initiatives to the project execution organisation.
313462	4.2.1.0.4712	New fields have been added to portfolio items: 'location' which refers to the location (programme) in which the related project or programme is executed and 'type icon' which shows an icon for the type of portfolio item: 'initiative', 'project', 'programme'.
315130	4.2.1.1.4740	The toolbox no longer displays a detected application URL (previously referenced to as application location) as the default value. This enables the administrator to configure the required application URL in the system settings to ensure consistent URL usage in notifications and application availability after updating the toolbox or restarting the server.
315471	4.2.1.1.4747	A time entry group may be related to a virtually infinite number of non-project activity sets. Previously this was limited to approximately 30.

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Microsoft Excel reporting:

Nr	Version solved	Description
310194	2.1.15	The Excel reports now work correctly while using the Internet Explorer SOAP connector on Windows Vista-platforms in combination with Office 2003.
307885	2.1.15	The 'Basic Excel Template' used for automated reports has been extended to support multi-line reports and detailed reporting for multiple objects (e.g. projects) within a single Excel template. To utilise these options, please contact Fortes Solutions.
313126	2.1.17	The 'Basic Excel Template' user for automated reports has been extended to allow copying data rows to other locations within the report. This allows for combining multiple lists into one view or to reuse the data at various locations in the report. To utilise this option, please contact Fortes Solutions.
313127	2.1.18	Office 2000 is now supported by the 'Basic Excel Template'. This support does not include the option for importing existing reports. This has to be done manually for Office 2000.

Microsoft Project add-in:

Nr	Version solved	Description
305310	2.2.0	The Microsoft Project add-in now supports full synchronisation of product dependencies between the Principal Toolbox and the Microsoft Project planning.
313124	2.2.0	The MS Project client now re-uses the session on initialisation of the project after initial download.

For more detailed information regarding new features, improvements and fixes, please contact our support desk at support@fortes.nl, through our customer portal <http://www.principaltoolbox.com/portal> or call +31 (0)53 - 43 17 450.