

Principal Toolbox®

RELEASE NOTES

Version 5.0

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
Single sheet projects	The concept of 'Single Sheet Projects' allows a portfolio manager to capture status information from projects that are not (yet) fully managed from within the Principal Toolbox. Within a 'Single Sheet Project' the project manager can quickly update and publish the status information that is periodically requested.
Support of initiatives	Besides projects and single sheet projects, initiatives (ideas) can now also be part of a portfolio. An initiative can easily be transformed in a operational project by clicking on "Start project" and selecting the appropriate project model.
Portfolio reporting	A portfolio manager can now easily request a status update from the projects within the portfolio by clicking on "Send report request". By selecting the appropriate reporting model (template), the portfolio manager can specify which information is requested from the project manager(s).
Multiple skills per resource	Resources can now have multiple skills. A resource has one "primary" skill and can have several "secondary" skills.
Non Project Activities	Now it is possible to plan activities that are not related to the project (Non-Project Activities). For example maintenance, incidences, training, etc. Planning these activities provides a better insight in the actual availability of resources and/or skills.
Timeline reporting	Timeline reports enable you to instantly report on different types of costs or hours over time.
Internal document links	With internal document links it is possible to link to other documents in Principal Toolbox. The biggest advantage is that it enables you to create a central place where all documents, templates and reports can be managed and it prevents the unnecessary duplication of documents.
Mandatory products	It is now possible to make products mandatory. This means that a product is fixed within the project plan. A project manager is not able to remove, change or delete the products.
PRINCE2 2009	The Principal Toolbox also contains a project model based on the 'new' PRINCE2 2009 approach. This model contains all registers or logs, templates and reports. Two versions are available out-of-the box (Standard and Small)
Document Management	A new tab called 'Documents' has been added to show all documents within the specific project. The search functionality can be extended with "Full Text Search" for searching within the documents (optional add-on).

SIMPLY FORTES.



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Add-ons:

Feature	Description
Resource allocation * NEW *	The entire resource allocation add-on has been modified to improve usability and information overview. Furthermore a resource can now have secondary skills besides his/her primary skill and Non-Project Activities can be planned (i.e. maintenance, incidences, training, etc.)

Minor Changes and Fixes:

Nr	Version solved	Description
315687	4.2.1.2.4755	Updates now work with Microsoft SQL 2000 databases.
316605	4.2.1.6.4771	Status description on programme is a memo field instead of a string.
317555	4.2.1.8.4778	Product detail page showed Euro sign, independent from settings and language.
318447	4.2.1.8.4785	Issues and risks can now be moved between programmes.
317620	4.2.1.9.4797	Programme managers can no longer change some properties of projects.
319258	4.2.1.11.4814	The 'Created' field is now available for actions and lessons learned.
320054	4.2.1.13.4828	Import of currency rates is now calculated correctly.
313464	4.2.2.0.4746	Moving stages and/or work packages within a project plan now works with FireFox 3.
333161	4.2.6.0.4999	The update file size is no longer limited to the maximum file size for uploads. Please note: a sufficiently high limit is still necessary to update to this version.
332193	4.2.5.0.4977	The MPX export works correctly with Microsoft Project 2007.
PT-512	4.2.9.0.5130	- Improved Office 2000 support - Styling update
PT-447	5.0.0.0.5124	The Activity Gantt correctly displays products and work packages without planned milestones.
PT-416	4.2.9.0.5117	The "Edit Properties" button at the portfolio report tab (project level) has been removed.
PT-410	4.2.9.0.5116	Archived projects are now displayed with the project name in red (instead of the ID).
PT-391	4.2.6.3.5042 4.2.8.0.5092	In some specific configurations dependency tags could lead to loops in calculations.
PT-388	4.2.7.3.5065	When entries of type 'Entry' are imported using the integration dashboard, calculations defined at the objects in the toolbox (for example projects) are directly triggered. Up-to-date results are now shown after an import or removal of imported entries.
PT-386	4.2.9.0.5117	Instead of "Unallocated resources" and "All resources" a summary row is now displayed at the resource allocation tab of a resource pool. The allocation totals now include the Non-Project Activities.
PT-375	4.2.7.2.5059	Moving products in the Gantt now works correctly (French locale only)
PT-307	4.2.8.0.5090	It is now possible to select how person fields should be exported using CSV. Available options are: ID, username or e-mail address.
PT-304	4.2.8.0.5073	Only the necessary buttons are shown in empty programme, project list en work area listings.

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PT-294	4.2.8.0.5074	Managers and Coordinators are now allowed to edit local views (at their own locations).
PT-264	4.2.8.0.5074	Units are selectable on the basic settings screen for timeline reports (French locale only).
PT-263	4.2.8.0.5085	A resource can now have one "primary skill" and multiple "secondary" skills.
PT-251	4.2.8.0.5064	When a product is removed from the project plan the associated date fields are now cleared.
PT-241	4.2.8.0.5070	When synchronising with LDAP, it is now possible to disable login by default for new users.
PT-240	4.2.8.0.5063 4.2.6.4.5045	The Portfolio Report Overdue indicator now properly calculates during Nightly Task.
PT-192	4.2.9.0.5104	The Resource Allocation tab at a project has been replaced by a pull down tab for Resource Management. This now offers an overview page with a configurable timeline report and the allocation page.
PT-83	4.2.9.0.5105	Timeline reports can now be configured to display cumulative data, also a choice is offered to use "0" as the initial value or to include the totals until the first period as initial value.
PT-77	4.2.8.0.5090	Report models can be configured at Portfolio level. When requesting a project status update at portfolio level these report models are available.
PT-71	4.2.9.0.5114	The 2009 version of the PRINCE2 Project Model is available and is shown as default for projects.
PT-67	4.2.8.0.5094	The Principal Toolbox version 5 style changes have been applied.
PT-62	4.2.8.0.5077	Names of programmes, projects and portfolios are displayed in a bold font at the dashboards.
PT-51	4.2.7.0.5056	Configuration on Enterprise level is moved to a new location called Setup.
PT-45	4.2.8.0.5064	It is possible to have a timeline report on entries without book date.
PT-35	4.2.7.0.5049	It is possible to configure custom fields in timeline- and entry- reports.

Portfolio Management:

Nr	Version solved	Description
316041	4.2.1.3.4758	Portfolio reports based on Microsoft Excel now work even if the field mappings is incorrect.
317621	4.2.1.8.4780	Status description is editable on portfolio level.
317622	4.2.1.8.4785	Customisation text on portfolio can now be changed.
324184	4.2.1.18.4873	Portfolio items could not be imported when only new objects should be created.
331238	4.2.1.21.4895	Fields from the portfolio item that a project is related to are now included in the automated RTF reports.
334017	4.2.1.25.4907	When using a large number of users as portfolio managers, readers or members, part of this list may be lost after restarting the application or after running a nightly consistency check.
PT-280	4.2.8.0.5074	Portfolio readers are no longer allowed to start initiatives.
PT-254	4.2.8.0.5076	The 'tree menu' in the left pane of the setup page now remains visible after navigating to the notifications page.
PT-253	4.2.8.0.5076	Managers and Readers at Portfolio level can now view the timeline reports.

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Nr	Version solved	Description
PT-234	4.2.7.2.5060	The Portfolio Report Request is now supported in the French language.

Resource Management:

Nr	Version solved	Description
316064	4.2.1.4.4761	The Filter page on the plan board of the resource planning now shows data.
324648	4.2.1.20.4888	The resource plan board scrolling functionality has been improved.
PT-476	4.2.9.0.5122	Unit (name) is displayed correctly for resource pool readers.
PT-441	4.2.9.0.5103	The 'Reports and Saved versions' tab at the Resource allocation pool has been removed Reports are now visible at the new dashboard tab.
PT-297	4.2.9.0.5118	It is now possible to allocate users to non-project activities at the resource availability tab of a resource pool.
PT-293	4.2.9.0.5106	A non-project activity set report has been added to the reports section. It is now possible to select non-project activity sets for a pool at the properties dialog.
PT-292	4.2.9.0.5114	Non-Project Activity Sets and the Non-Project Activities can now be managed at Setup instead of at Time Entry.
PT-269	4.2.8.0.5085	Both the primary skill and secondary skills (if applicable) are shown for resources on the availability tab of a resource pool.
PT-268	4.2.8.0.5087	When a specific skill is requested, the resource manager sees all resources with this skill (primary or secondary). After selecting a resource, both the primary skill as well as the secondary skills will be shown.
PT-193	4.2.9.0.5099	The first tab within a resource pool now displays a dashboard page.
PT-116	4.2.9.0.5118	Timeline settings can be configured separately for the allocation and availability tab.
PT-92	4.2.9.0. 5114	A report on the resource pool(s) has been added to the reports section at Resource Allocation.
PT-90	4.2.9.0.5111	Custom fields for a pool are displayed at a new tab: "Properties" and they can be edited by resource pool managers.
PT-89	4.2.9.0.5109	Management of non-project activity sets and non-project activities has been moved from Time Entry to Setup as they are now used for Time Entry and Resource Allocation.
PT-72	4.2.7.0.5048	The column Allocation has been added to the Resource Pool screen.
PT-47	4.2.8.0.5068	It is now possible to request resources from multiple pools.
PT-37	4.2.6.4.5043	When assigning a resource on skill level, the request and allocation are now shown on one single line.
PT-36	4.2.7.0.5048	It is now possible for Project Managers to plan capacity on a product.

Managing Successful Programmes:

Nr	Version solved	Description
PT-303	4.2.8.0.5074	The MSP Programme is now created and shown again for new MSP programmes created at enterprise.

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Timesheets:

Nr	Version solved	Description
333314	4.2.1.23.4899	<p>The week numbering was done based on the locale of the system the Principal Toolbox was running on instead of the configured default locale of the Toolbox. This situation has been fixed. However, because of this fix, All customers must check the following prior to running this update:</p> <ul style="list-style-type: none"> - In case they want December 28 (and January 1) to be in week 53, they must make sure the system's default locale is set to either Dutch or UK English. - After the update the week numbering for 2009 and 2010 will be corrected. A new setting will be available as well which gives control over the week numbering behaviour regardless of configured locale. The settings is called 'First week of year' and allows two values: <ul style="list-style-type: none"> - 'Week that contains a minimum of 4 days in January (ISO)' (this is the default) - 'Week that contains 1st of January' <p>Customers that have set their locale to English US, must set this setting to 'Week that contains 1st of January' to get the desired behaviour for the end of this year.</p>
331253	4.2.1.21 4895	A fix has been created to prevent out-of-memory errors on time sheet creation.
PT-306	4.2.8.0.5088	The automated Reports section is also displayed for Time Entry Group readers.
PT-305	4.2.8.0.5088	Time Entry Readers are no longer able to add, edit or remove automated reports.
PT-296	4.2.9.0.5111	Time Entry Group has been added as a column/filter option for timeline reports.
PT-276	4.2.8.0.5078	It is now possible to create new time sheets as correction sheets. Correction time sheets will not require minimal hours and can be identified in the listing with the extra column.

Integration Dashboard:

Nr	Version solved	Description
315084	4.2.2.0.4735	A schedule for every other week has been added to the import/export tasks.
324717	4.2.4.9.4942	For import tasks of objects that are not updated/created it is possible to reduce the logging
PT-317	4.2.8.0.5074	Field mapping is possible for import tasks on cost/hour entries.
PT-225	4.2.6.4.5046	Fixed SOAP connectivity with reference client SoapUI.
PT-32	4.2.6.4.5046	Ability to import custom fields associated with bookings.
PT-31	4.2.6.4.5046	Ability to associate bookings with projects during import.

Microsoft Excel reporting:

Nr	Version solved	Description
315825	4.2.1.2.4755	Microsoft Excel reporting and export functionalities work after 1000 records.
318448	4.2.1.8.4788	The parent field on programmes is available in automated Excel report.
323734	4.2.4.5.4907	Corrected version check for Microsoft Excel is independent of regional settings and / or installations.

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Microsoft Security Integration:

Nr	Version solved	Description
PT-245	4.2.8.0.5069	When changing a user from Named User to Normal User, LDAP synchronisation mapping should be done on e-mail address and not on User Name to avoid user duplication.

Multi-Currency Support:

Nr	Version solved	Description
320054	4.2.1.13.4828	Import of currency rates is calculated correctly.

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.