



# About Daptiv PPM

## Summer '08

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## Introduction

The Summer '08 Daptiv PPM release adds improved functionality including the launch of the Daptiv Greenhouse, performance enhancements to the Team Manager and Timesheets applications, and fixed issues.

**Note:** We are committed to continually improving Daptiv PPM. We rely on input from customers and end-users to help us address business problems adequately. Your input is welcome.

### Summer '08 PPM release includes:

- **Daptiv Community Greenhouse**—The Daptiv community has expanded to include the Greenhouse, a meeting place for Daptiv customers to collectively suggest, discuss and express opinions about possible product features and enhancements. For more information, see *Daptiv Greenhouse*.
- **Team Manager Performance Enhancements**—Performance improvements make Team Manager faster and more efficient. For more information, see *Team Manager Performance*.
- **Timesheets Performance Enhancements**—Timesheets performance improvements speed opening of timesheets, especially when a timesheet includes large numbers of tasks. For more information, see *Timesheets Performance*.
- **Schedule adjustment msg**—A new message regarding schedule adjustment has been added to clarify situations when a project schedule may have been impacted and need adjusting.

**Fixed Issues**—Customer-reported issues that are fixed in this Quality Update. See *Fixed Issues* for more details.

## Daptiv Community Greenhouse

Daptiv PPM Summer '08 adds the new Greenhouse to the Daptiv Community, providing customers with a location for sharing ideas for improving PPM.

As a meeting place, the Greenhouse gives Daptiv customers the opportunity to collectively decide which new product features/enhancements are most important to them. Users can submit product ideas, vote or comment on existing ideas and get insight into which ideas have been implemented into our product. The purpose of the Greenhouse is to create a simple and direct product feedback vehicle while also giving our community better insight into our product roadmap.

### How it Works:

The following sections walk you through some of the steps you might take in the Greenhouse to plant (suggest) an idea or comment or vote on an idea planted by someone else. Other features of the Greenhouse are described as well.

**Note:** You must log in to the Daptiv Community in order to access the Greenhouse.

### TO LOG IN TO THE DAPTIV COMMUNITY:

1. Open the Daptiv Community web site:

- From within Daptiv PPM, click **Help and Support** and then **Connect with the Daptiv Community**.



The Community opens in a new browser window.

**Note:** The login page displays even if you previously selected **Next time automatically sign me in**. If you see a Greenhouse tab , or a **Sign out** link in the upper right  you are already signed in and do not need to sign in again.

- In a browser (without logging into PPM) go directly to the Community by typing <http://community.daptiv.com> .

2. On the Community site, if you are not already signed in, click **Sign In** at the upper right corner of the screen.

Once you have signed in, a new **Greenhouse** tab displays. Click the **Greenhouse** tab to go to the Daptiv Greenhouse.

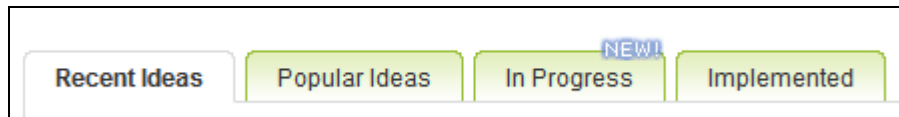
**Tip:** If you are a hosted Daptiv customer, you are already a member of the Daptiv Community – just login with your existing Daptiv PPM email and password. If you are an On-Site or Private Hosted Customer, please request a Daptiv Community Account from our Community manager at [daptivcommunityadmin@daptiv.com](mailto:daptivcommunityadmin@daptiv.com)

## Navigation in the Greenhouse

Ideas in the Greenhouse are organized by tabs:

- **Recent Ideas**—Look here to see the most recent ideas posted by the community.
- **Popular Ideas**—This is where you can find the ideas that have received the most votes from the community.
- **In Progress**—In Progress ideas are those currently being worked on by Daptiv.
- **Implemented**—Implemented ideas are those that have been developed and incorporated into current or upcoming Daptiv PPM releases.

This organization allows you to quickly see what other customers are requesting, what progress is being made on ideas, and when something is implemented.



Once you log in to the Greenhouse, you can take a variety of actions.

- **Plant an idea**—Have a good idea for Daptiv PPM? Post the idea to the Greenhouse so other customers can see, comment on and vote for.
- **Vote for an existing idea**—See an idea you like? Vote for the idea to add points to it. The more points, the more attention an idea is given by Daptiv.
- **Add comments to an idea**—Have an opinion on someone else's idea? Make comments about the idea, ask questions or suggest alternatives.
- **Make an idea a favorite**—Want easy access to specific ideas so you can keep track of what happens to them without getting email notifications or RSS feeds? Make the idea a favorite and check your **Favorite Ideas** tab whenever you log into the Greenhouse.

## Planting Ideas

### TO PLANT AN IDEA:

1. Log onto the Greenhouse.
2. Search through the existing ideas to see if someone else has already made the suggestion.

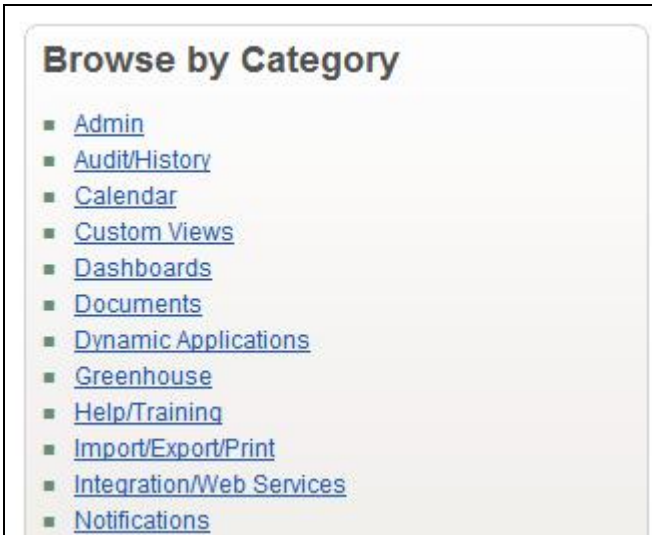
You can search existing ideas using the **Search** field:



**Search existing ideas**

  
[Top Contributors](#)

or by browsing idea categories:



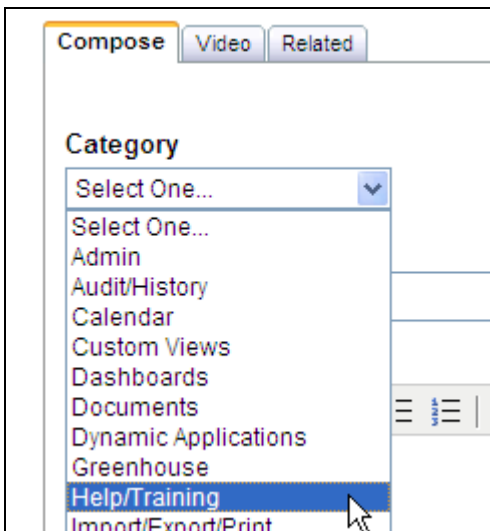
**Browse by Category**

- [Admin](#)
- [Audit/History](#)
- [Calendar](#)
- [Custom Views](#)
- [Dashboards](#)
- [Documents](#)
- [Dynamic Applications](#)
- [Greenhouse](#)
- [Help/Training](#)
- [Import/Export/Print](#)
- [Integration/Web Services](#)
- [Notifications](#)

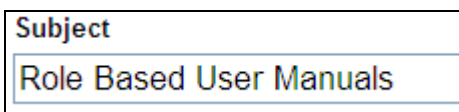
3. If your idea has not already been planted by someone else, click **Plant Idea Now** to begin posting your idea:



4. Select the appropriate product **Category**:

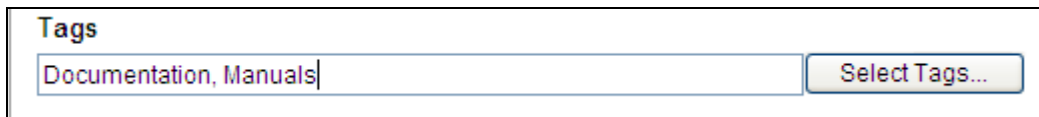


5. Give your idea a **Subject** (title) and describe the idea in the Message section:



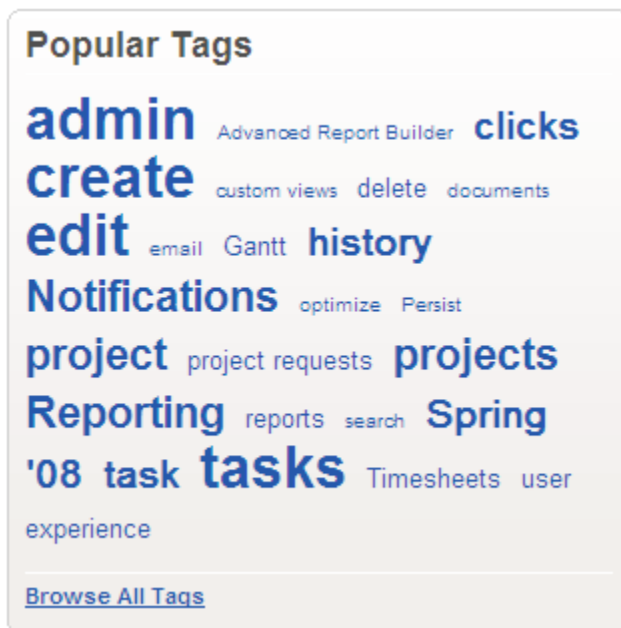
The **Subject** is the title other users will see when they browse in the Greenhouse. Communicate your idea as clearly and as compellingly as possible so others will be encouraged to comment or vote on it.

- To include tags for your idea, type them in the **Tags** box. Separate multiple tags with a comma (.). To see (and select existing tags), click **Select Tags** and choose one or more of the listed tags.

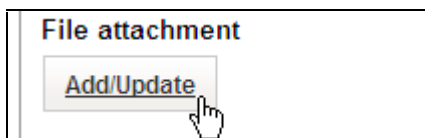


The screenshot shows a rectangular box with a light gray background. At the top left, the word "Tags" is written in a bold, dark font. Below it is a text input field containing the text "Documentation, Manuals". To the right of the input field is a button with the text "Select Tags..." in a light blue font.

Tags are keywords that describe the content of ideas and help other users to find them. The more frequently used a tag is, the larger the tag displays on the main Greenhouse page. This makes it easy to see what areas and concepts are most frequently written about:



- If you have an image you want to include to illustrate your idea, click **Add/Update**





8. If you want to receive email when someone posts a comment to your idea, select **Email me replies to this post**.

Email me replies to this post.

**Note:** This is enabled by default.

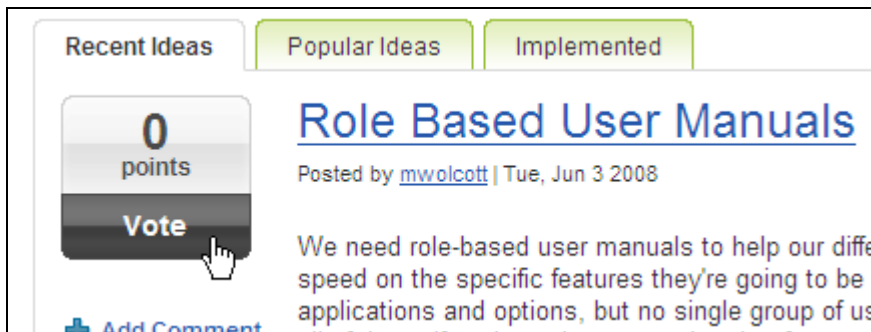
9. Click **Post** to plant your idea.  
Your idea is added to the list of Greenhouse ideas and other users can read about it, comment on it and vote for it.

## Voting for Ideas

Other Daptiv customers are posting ideas and making comments on feature suggestions. If you see something you think is a good idea, vote for it. Each vote adds 10 points to the total points for the idea, raising it in the ranking of planted ideas. **Note:** You can only vote for any single idea one time.

### TO VOTE FOR AN IDEA:

1. Log onto the Greenhouse.
2. Find the idea you want to vote for.
3. Click **Vote**.



The point count for the idea is incremented by 10 points and an indicator shows that you have voted on the idea.

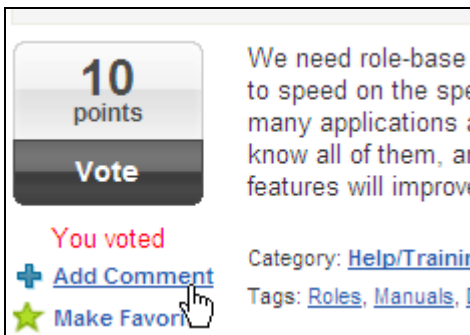
## Commenting on Ideas

You may see another user's idea and have some thoughts on it. Sometimes there's a way to accomplish the goal they have without making any changes to PPM. Other times there are alternative approaches that can solve the issue the user is hoping to fix with their suggestion.

Share your knowledge of PPM and the tricks you have learned over time. Participate by making a comment on someone else's idea.

### TO COMMENT ON AN IDEA:

1. Log onto the Greenhouse.
2. Find the idea you want to comment on.
3. Click **Add Comment**.



The Compose window opens so you can type your comment.

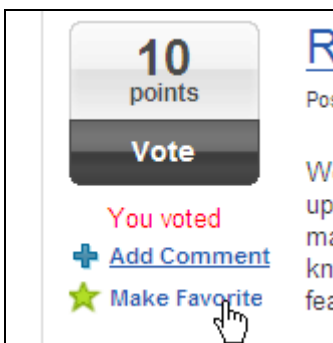
4. Type your comments in the **Message** box.
5. Add tags if you want to include tags about your comment.  
**Note:** The tags you add here are specific to your comment, not to the original idea.

## Making an Idea a Favorite

If you see ideas you want to keep track of, but do not want to get email messages about, you can make those ideas “favorites.” Favorite ideas are displayed on a separate tab in your Greenhouse profile, making them easy to find, no matter what happens to them.

### TO MAKE AN IDEA A FAVORITE:

1. Log onto the Greenhouse.
2. Find the idea you want to make a favorite.
3. Click **Make Favorite**.



The idea is added to the list of your favorite ideas.

### TO VIEW YOUR FAVORITE IDEAS:

1. Click **Greenhouse Profile**.



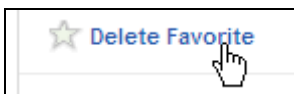
Your Greenhouse profile displays with four tabs: **My Votes**, **My Comments**, **My Ideas** and **My Favorite Ideas**.

2. Click **My Favorite Ideas**.



A list of the ideas you have made favorites displays.

**Note:** To remove an idea from Favorites list, click **Delete Favorite**:



## Viewing your Greenhouse Profile

Your Greenhouse Profile gathers all of your Greenhouse activity onto one page with four tabs. This allows you to quickly access your favorite ideas, your comments, your votes and the ideas you planted.

### TO VIEW YOUR GREENHOUSE PROFILE:

1. Click **Greenhouse Profile**.



2. Click the appropriate tab to view your activity:

- **My Votes**—View the ideas you have voted for.
- **My Comments**—View the comments you have made on posted ideas.
- **My Ideas**—View the ideas you have planted.
- **My Favorite Ideas**—View the ideas you have marked as your favorites.

## Subscribing to Ideas

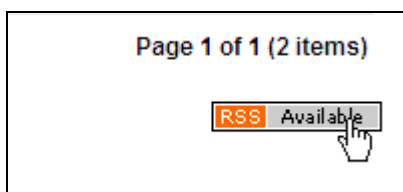
There are a number of different ways you can subscribe to ideas in the Greenhouse.

### *Subscribing to a specific idea*

You can subscribe to specific ideas to keep track of what happens to those ideas.

#### **TO GET AN RSS FEED ABOUT A SPECIFIC IDEA:**

1. In the Greenhouse, click the title of a post.  
The post details display.
2. Click **RSS Available** at the bottom right of the details:



You get an RSS feed for every comment made on the idea.

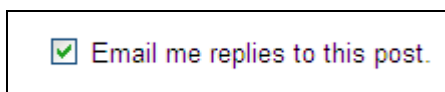
#### **TO GET EMAIL ABOUT A SPECIFIC IDEA:**

1. In the Greenhouse, click the title of a post.  
The post details display.
2. Click **Email Subscription Disabled** below the title of the idea:



You receive an email message every time someone posts a comment on the idea.

**Note:** When creating the idea, an option to receive email when anyone comments on your idea is enabled by default:



If you do not clear this option, you receive email messages with any comments posted about your idea.

**Subscribing to all ideas**

You can subscribe to an RSS feed for notification any time a new idea is posted to the Greenhouse.

**TO GET AN RSS FEED ABOUT ALL NEW IDEAS:**

- In the main Greenhouse screen, click **Available using RSS** at the bottom right:



You get an RSS feed for each new idea that is planted.

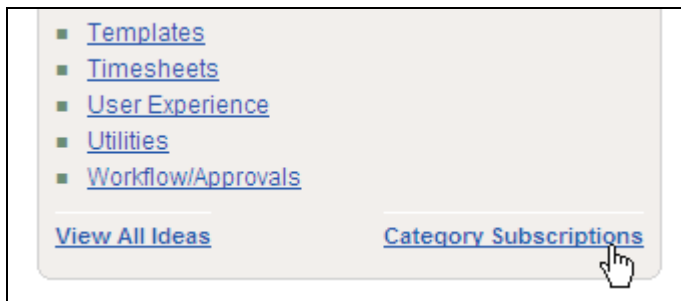
**Note:** You do not get notified when a comment is made on an idea. When you see a particular idea you want to track, subscribe to that specific idea to be notified about comments other users make.

## Subscribing to all ideas in a category

You can subscribe to email notification any time a new idea is posted in a particular category in the Greenhouse.

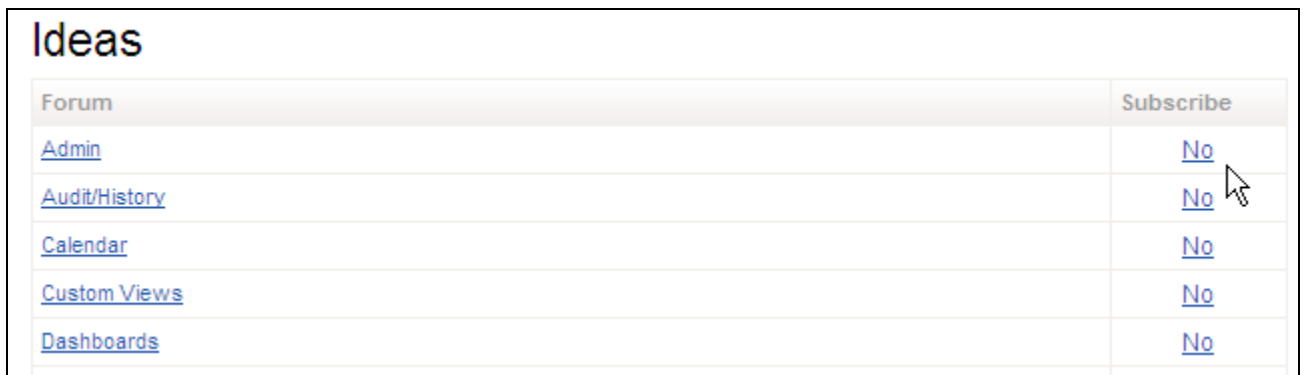
### TO GET EMAIL ABOUT ALL IDEAS IN A CATEGORY:

1. On the main Greenhouse screen, beneath the Categories list, click **Category Subscriptions**:



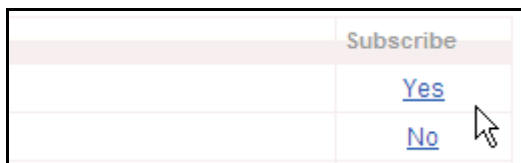
A list of categories displays.

2. For each category you want to get email when an idea is planted, click **No** in the Subscribe column:



Forum	Subscribe
<a href="#">Admin</a>	<a href="#">No</a>
<a href="#">Audit/History</a>	<a href="#">No</a>
<a href="#">Calendar</a>	<a href="#">No</a>
<a href="#">Custom Views</a>	<a href="#">No</a>
<a href="#">Dashboards</a>	<a href="#">No</a>

The **No** changes to **Yes** to indicate you are subscribed to that category:



Subscribe
<a href="#">Yes</a>
<a href="#">No</a>

**Note:** Unsubscribe to a category by clicking **Yes**.



## ***What You Need to Know About the Daptiv Greenhouse***

Knowing the following will help make your experience with the Daptiv Greenhouse more satisfying:

- You cannot access the Greenhouse without logging into the Daptiv Community (there are other areas of the Community you can browse without logging in).
- Logging into the Greenhouse:
  - If you are a Daptiv PPM user:
    - If you ***did not have a Daptiv Community account***, you are automatically added as a member of the Daptiv Community and can log in using your PPM login (email and password).
    - If you ***already had a Daptiv Community account***, your login is changed to your PPM login.
  - If you are not a Daptiv user (you do not have an account in a PPM enterprise):
    - If you ***did not have a Daptiv Community account***, you can request one from the Community administrator by emailing: [daptivcommunityadmin@daptiv.com](mailto:daptivcommunityadmin@daptiv.com)
    - If you ***already had a Daptiv Community account***, your log in remains what it was before the Summer '08 release.
- You can only vote once for any single idea
- The Greenhouse is intended to provide a forum for Daptiv users to make product suggestions and to vote on ideas suggested by other users. Daptiv monitors and participates in Greenhouse discussions but there is no guarantee that suggestions will be included in future releases.
- When you access the Greenhouse from PPM by clicking **Connect to the Daptiv Community**, a login page opens in a new window. This occurs even if you previously elected to be automatically logged in.

## Team Manager Performance Enhancements

Performance enhancements to the Team Manager application greatly improve the speed of display of information.

**Note:** Daptiv is committed to maximizing the user experience for Daptiv PPM and our development team is continuing to work on performance improvements in Team Manager and other areas of Daptiv PPM for future releases and Quality Updates.

### *How it works*

The Team Manager application can display a great deal of data, and as a result can take a significant amount of time to load. To reduce the impact of this, Team Manager has been updated to take advantage of “cached” data. The data cache is created the first time you open Team Manager in a PPM session and is used for the duration of that session (though it may be updated if you take actions that impact the data). Once the cache is loaded, there is virtually no wait for data retrieval. For most users and in most cases, the data cache remains valid for the length of your PPM session.

A new **Refresh** button in Team Manager allows you to refresh the data cache on demand. You might do this if you have made changes to the resources you manage or you know another manager or administrator has made changes to the resources or to their allocation. Clicking Refresh updates the display of resource assignments to ensure you are looking at the most up-to-date data.

If another manager or administrator makes a change you are not aware of, that change is not reflected in the Resource Assignments portion of the display unless you manually refresh the screen. ***This will not cause any data corruption or loss***, but can mislead you about the status of assignments.

**Note:** If you attempt to assign a resource that you no longer manage, a message displays, telling you that this is not possible.

When should you click **Refresh**?

- If you are not seeing data listed in the Resource Assignments section that you expect.
- If another user has told you that they have assigned or removed you as resource manager for a user but that change is not reflected in the Team Manager display.
- If a project manager has deleted a already allocated resource request (using the Resource Allocation application).

## TO REFRESH THE TEAM MANAGER DISPLAY:

1. Log in to Daptiv PPM and click the **Team Manager** tab.  
**Note:** You only see this tab if you have the enterprise role of Resource Manager or are a supervisor of another PPM user.
2. At the right side of the Resource Assignments area, click **Refresh** to refresh the Resource Assignments data.

Hours Available vs. Assigned					Refresh
Jul 08	Aug 08	Sep 08	Oct 08	Nov 08	
184	168	176	184	160	

Unless another user is making changes to the resources you manage, there should be no change when the display is refreshed. As noted above, this scenario is unlikely.

**Note:** The refresh process can take some time.

## ***What You Need to Know About Enhancements to Team Manager Performance***

Understanding the following will help you take advantage of the latest Team Manager performance improvements:

- Initial load of Team Manager data (the first time you access Team Manager during a PPM session) may still take some time.
- In most cases it is not necessary to refresh the Resource Allocation data.
- If you do not refresh resource allocation data and it is out of date, there is no danger of data corruption. Data will be refreshed or a message displayed telling you of an inconsistency (for example, if a displayed resource is no longer assigned to you).

## Timesheets Performance Enhancements

Performance enhancements to the Timesheets application improve the speed of opening Timesheets. PPM users with timesheets that include large numbers of tasks or that include projects with project-level time tracking should see improved performance when opening the Timesheets application.

**Note:** Daptiv is committed to maximizing the user experience for Daptiv PPM and our development team is continuing to work on performance improvements in Timesheets and other areas of Daptiv PPM for future Quality Updates and releases.

### *How it works*

There is no change in behavior for users of Timesheets. Click the Timesheets tab to open the Timesheets application. Performance benefits focus on timesheets with any of the following:

- Large numbers of tasks
- Line-items for projects using project-level time tracking

**Important:** The Timesheets application uses JavaScript and in order to benefit from the most recent performance improvements, you need to clear your browser cache. Doing this forces the browser to use the latest JavaScript from Timesheets. If you do not do this, you may not see any performance improvements.

The following walks you through the process of opening Timesheets.

**Note:** The process has not changed, so these steps are identical to the steps you took prior to the performance improvements.

### **TO OPEN THE TIMESHEETS APPLICATION:**

1. Log in to Daptiv PPM.
2. Click the **Timesheets** tab.



## ***What You Need to Know About Enhancements to Timesheets Performance***

Understanding the following will help you take advantage of the latest Timesheets performance improvements:

- You need to clear your browser cache in order to force it to use the most recent JavaScript in Timesheets. How you do this depends on your browser and browser version. See your browser documentation for details on clearing the cache.
- Timesheets with large numbers of tasks will show the most significant performance improvements.
- Timesheets with projects that use project-level time tracking will show significant performance improvements
- Tasks with long durations can cause slow performance in Timesheets.
- Tasks with many assignees can cause slow performance in Timesheets.

## Known Issues for PPM Summer '08

### Schedule Adjustment Prompt

- **Global Non-working Time**

If you create and then delete global non-working time, projects that would have been impacted by that time are still flagged for schedule adjustment, and a message saying the project schedule has been affected and offering to make the adjustment displays. Clicking **Yes** to adjust the schedule creates a baseline but makes no changes to the schedule because it does not need adjusting.

### Timesheets Performance Enhancements

- **Clearing Browser Cache**

In order to benefit from performance enhancements in the PPM Timesheets application, you need to clear your browser cache of old JavaScript. The process to clear your browser cache depends on the browser and version you are using.

### Column Alignment in Resource Allocation

- **Data columns out of alignment**

When you have multiple global tabs displayed, the data alignment in the Project Resource Allocation application can become skewed. If your data columns are not properly aligned, hide some of the global tabs to correct the problem.

## Fixed Issues

The following issues are fixed in PPM Summer '08.

Area	Summary	Issue ID
<b>Capacity Planner</b>	Deleted resource types are not removed from the list of available resource types. Support cases: 21971: 21394: 23361, 24460,25192, 29573, 30208, 30255, 30618, 30479, 30480, 31056, 30208, 30255, 30208, 34696	<b>29750</b>
<b>Documentation/Help</b>	Create Work Calendar page is calling wrong Help detail pane.	<b>49774</b>
<b>Projects</b>	Duplicate applications are visible in project. Support cases: 33264, 34292	<b>45366</b>
<b>Projects (Tasks)</b>	Checking in project with range that includes non-working time but does not have tasks causes "Schedule Needs Adjustment" message display.	<b>40872</b>
	NWT message appears at task import even if there is no NWT and project schedule is adjusted differently based on whether PM accepts or does not accept the changes	<b>41452</b>
	Users prompted to adjust sched for non-work time even though none is set up.	<b>45906</b>
<b>Project Requests</b>	No warning when deleting a Project Request from Action menu in details window. Support case: 37117	<b>49607</b>
<b>Reports (PPM)</b>	WI Report - Error when adding a custom project field (concatenation calculation)	<b>47782</b>

<b>Resource Allocation</b>	UK Dates in Project Resource Allocation do not match up to information below	<b>46887</b>
<b>Resource Allocation</b>	Resource Allocation performance problems. Support cases: 32163, 32312, 30817, 32201; 34419,34580, 34323, 35581, 37099	<b>48855</b>
<b>Team Manager</b>	Team manager script times out when approving resource assignment. Support cases: 23636, 26307, 26779	<b>47354</b>
	Performance issues	<b>48445, 48446</b>
<b>Timesheets</b>	Cannot save time in timesheet with timesheet includes more than 500 tasks. Support cases: 26762, 27450, 29580, 35860	<b>37061</b>
	Viewing Timesheets by Project generated errors when more than 50 projects were selected. Support cases: 37386, 37535.	<b>49269</b>
	Can't select "Project/Non-Project Work" in Timesheets	<b>49638</b>
<b>User Experience</b>	Webform error redirects users to login page. Support case: 35275.	<b>49185</b>