



# About Daptiv Fall '09

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Last Revised: September 8, 2009



## Revision History

Last Revised: September 8, 2009

- **Updated Announcement:**
  - Added details on legacy reporting
- **Reformatted Known Issues**
  - Divided into Daptiv PPM Known Issues and Daptiv Scrum Known Issues

Original Version: August 27, 2009

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## Introduction to Daptiv Fall '09

Continuing a focus on quality, the Fall '09 Daptiv release improves existing functionality and fixes many customer issues, providing immediate benefits to users of Daptiv PPM, Daptiv Reports and Daptiv Scrum.

This document is designed to help you understand how new and changed features impact use of Daptiv, and to guide you in making decisions about how to configure new features (if applicable).

### **Fall '09 release includes:**

- **PPM**

- **Enhancements**

- **Reporting**—You can now select the Email Report option when running a report with options. This addresses numerous customer-reported issues. For specific issues addressed, see the *Fixed Issues* list.
- **Data Presentation Model**—Timesheets folder is renamed Time Tracking. There is no impact to existing reports. For more information, see *Reporting Data Model Name Change*.
- **Pick Lists include a “---Please Select---” option**—Custom drop-down menu pick lists now automatically include a “---Please Select---” option. For more information, see *Custom Pick Lists “Please Select” Option*.

 **Note:** This addresses a Greenhouse idea totaling 140 points.

- **Scrum**

**Note:** These features and enhancements apply only to Daptiv Scrum.

- **New Features**

- **Time Tracking for Scrum Application Items**—Add/edit/delete work entries for application items. For more information, see *Time Tracking in Scrum Applications*.
- **Calculation Fields in Scrum Applications**—Applications now support calculation fields. For more information, see *Adding Calculation Fields to Scrum Applications*.
- **Link to Projects in Related Lists and Lookup Fields**—Link application data to projects in related lists and lookup fields. For more information, see *Linking to Projects in Related Lists and Lookup Fields*.

- **Enhancements**

- **Custom Views for Related Lists and Lookup Fields**—Custom views help data selection in related lists and lookup fields. For more information, see *Using Custom Views in Related Lists and Lookup Fields*.

## Announcements

### *Legacy Reporting has been discontinued*

- **Legacy Reporting Functions Are No Longer Available**— As of the Fall '09 release of PPM, access to legacy reports and reporting functionality, including Advanced Reporting Engine (ARE) and Crystal Reports, has been disabled.

This change affects the small subset of PPM users who still do one or more of the following:

- Run “Canned” reports
- Upload Crystal Reports
- Create legacy Custom Reports
- Run Crystal Reports or legacy custom reports
- Use the Project Home “Project Reports” Dashboard Pane

In September 2008, Daptiv announced the coming removal of legacy reports and reporting functions. Subsequent reminders included email, and in-line notifications on applicable PPM pages starting in late January 2009.

For information about current PPM Reporting options, contact Daptiv Account Management at [acctmgmt@daptiv.com](mailto:acctmgmt@daptiv.com) or 1-888-621-8361.

## Daptiv PPM

### Enhancements

#### **Reporting Data Model Name Change**

In the Daptiv Reporting Data Model, the top-level **Timesheets** folder has been renamed **Time Tracking**. This change is for clarity (the folder contains query items for more than just Timesheets) and has no impact on new or existing reports. To see how this changes the model, see *Data Model Changes* in the Appendix.

#### **Custom Pick Lists include “--- Please Select ---” option**

Custom pick lists using a Drop-down Menu format now automatically include a built-in “--- **Please Select** ---” display option, improving usability by eliminating the need to create this option manually. This option is visible in item details. It is not visible or available for filtering in list views or reports.

- If the field is required, “---**Please Select**---” is *not* a valid option (users are forced to select another option).
- If the field is optional (not required) “---**Please Select**---” is a valid option (users do not need to select another option).
- If no user-provided option is selected (if the field is optional), it displays as blank in global application list views and in reports and does not appear as a filter option in either.

**Important:** If customers have created a similar option (“**Select One**” for example), the administrator needs to edit the field to remove this option, or the pick list menu will display both options. For more information, see *Configurable Features in Daptiv PPM*.

For more information, see *Custom Pick Lists* in the Appendix.

## Daptiv Scrum

### New Features

#### ***Time Tracking in Scrum Applications***

You can now add work to any application item in Daptiv Scrum. Adding work to an item allows you to enter time against an item and treat the item like a task. Once added, the work entries can be edited or deleted and can be reported on. Work in solution applications is tracked separately from other Daptiv work and does not appear on timesheets. **Note:** All transactions are preserved for audit and history purposes. For more information, see *Using Time Tracking in Scrum* in the Appendix.

#### ***Adding Calculated Fields to Scrum Applications***

Scrum administrators can add calculated fields to Scrum applications to display read-only results of basic mathematical functions (+, -, \*, /) performed on numeric fields in the same application. For more information, see *Using Calculated Fields in Scrum* in the Appendix.

#### ***Related Fields/Lookup Fields support link to Projects***

You can now link application items to projects in lookup fields and related lists. **Note:** Only project fields are available. Project-related application data is not available for linking. For more information, see *Using Project Links* in the Appendix.

### Enhancements

#### ***Using Custom Views in Related Lists and Lookup Fields***

You can now select a custom view to display the item options for related lists and lookup fields. This gives you flexibility and increased usability by allowing you to see the data you need when choosing items for related lists and lookup fields. For more information, see *Using Custom Views in Related Lists and Lookup Fields* In the Appendix.

#### ***Numeric Fields support “Currency” option***

Application numeric fields now include a **Show Currency Symbol** option. When selected, the field includes a currency symbol (based the Daptiv Currency setting). For more information, see the Daptiv Solutions Online Help.

## Administrator Configuration Notes

This section outlines the new and enhanced Daptiv features that require configuration by administrators when upgrading to Fall '09 Edition, or about which administrators may be interested. For most Daptiv users (non-administrators) this information does not directly apply.

### Configurable Features in Daptiv PPM

- The automatic “--- **Please Select** ---“ option for drop-down pick lists requires that administrators or creators of dynamic applications edit any existing pick lists that use the drop-down menu format and include a customer-created option similar to “Please Select.” Until such lists are edited, two similar options display, the system default, and the customer-created option. For more information, see *Custom Pick Lists* in the Appendix.

### Configurable Features in Daptiv Scrum

- Solution designers can now link to projects from Lookup Fields and Related Lists. For details, see the *Linking to Projects* in the Appendix.
- Solution designers can now add Calculation Fields to Scrum applications. For details, see *Adding Calculation Fields to Applications* in the Appendix.

## Fixed Issues

The Daptiv Fall '09 release fixes the following issues.

Area	Issue ID	Summary
<b>Administration</b>		
	<b>56713</b>	Cannot delete Enterprise Role. – <i>Support case 50476, 50846, 51091, 51330, 51784, 51897, 52127, 52432, 52544, 53218, 53309, 53466, 53497, 54084, 54418, 54691, 54763, 55051</i>
	<b>57565</b>	Inactivating a user results in gateway timeout. Locks up app until timeout threshold is met. – <i>Support Case 54435</i>
	<b>57664</b>	Afghanistan is the default country when creating a new external resource – <i>Support case: 54684</i>
<b>Custom Fields</b>		
	<b>51097</b>	Exception when creating a multi select pick list – <i>Support Case: 51097</i>
<b>Custom Views</b>		
	<b>57311</b>	Cannot filter on integer except 0 in custom views – <i>Support case: 53093</i>
<b>Dynamic Applications</b>		
	<b>56508</b>	Creating a view with a filter within the project DA does not work with Firefox – <i>Support case: 48001, 48808, 48912, 50732</i>
	<b>57708</b>	Cross referenced value is null when editing DA item – <i>Support case: 54794</i>
<b>Executive Tab</b>		
	<b>56257</b>	Exception error when attempting to view the scorecard for a specific executive custom view– <i>Support case: 47815, 48589, 49996, 50036, 50676, 51212, 52126</i>
<b>Gantt</b>		
	<b>56932</b>	When copy and paste of task the assignee isn't showing on the new task but is receiving email notifications – <i>Support case: 51127</i>
<b>Gantt Chart (printable)</b>		
	<b>51849</b>	Error when Print Gantt Chart selected – <i>Support case: 40747, 42703, 43559, 47025, 48979, 50958, 50979</i>
<b>Issues</b>		
	<b>57484</b>	Mark Issues as Complete, doesn't change the % complete – <i>Support case: 53896, 53907, 54123, 54701, 55187</i>

<b>Notifications</b>	
<b>47513</b>	User assigned to a project during creation from project request as a member gets a notification stating their role is a project manager – <i>Support case: 34608, 30941, 35622, 36021, 36737, 39970, 40796, 40856, 43320, 43654, 50006, 50196, 51927, 52537, 54074, 54103, 54254</i>
<b>53709, 57757</b>	Resource requirement hours reduction notification misleading – <i>Support case: 43968, 46383, 47348, 48056, 48837, 50756, 52281, 52926, 53239, 53336, 53658</i>
<b>56520</b>	System notifications not being delivered when "Everyone Else" is checked. – <i>Support case: 48761, 48855, 49307, 51077, 52704, 52763, 53433, 54907, 54966</i>
<b>Project Admin</b>	
<b>53679</b>	Projects in DAFWA enterprise cannot be deleted – <i>Support case: 42461</i>
<b>57184</b>	Total Estimated Cost status field is incorrect. – <i>Support case: 52540</i>
<b>57373</b>	Archive Project alert (message) missing punctuation. It has no question mark. – <i>Support case: 53333</i>
<b>Project Requests</b>	
<b>57269</b>	Can't download documents from a project request. – <i>Support case: 52798</i>
<b>Reports (PPM)</b>	
<b>47242</b>	WI Report; error when running report for delivery by e-mail – <i>Support case: 32957, 34360, 35569, 36138, 40640, 43198, 47655, 48052, 48962, 51109, 52078, 52203, 52321, 52736, 54172</i>
<b>53297</b>	Email Report Error – <i>Support case: 43198</i>
<b>55025</b>	Error when you try to Run Report with Options – <i>Support case: 45543</i>
<b>55835</b>	Error when running Cognos report with options and emailing – <i>Support case: 46457, 47193, 47485, 47950, 49517, 49821, 51248, 51364, 51655, 51596, 51980, 51924, 53990, 53994, 54342, 54165, 55134, 55388, 55250</i>
<b>55916</b>	Error when trying to schedule a report. – <i>Support case: 46488, 47358, 52007, 55091</i>
<b>56667</b>	Task Dependency ID is not correct in RB – <i>Support case: 50125</i>
<b>56752</b>	The Assignee Full Name field from Task Planned Work field will incorrectly show the name of an unassigned user if they add actual work to the task – <i>Support case: 50629</i>
<b>57146</b>	'Run with Options' emails not sent if prompts aren't set. Message says otherwise. – <i>Support case: 51873</i>

<b>Resource Management</b>	
<b>57031</b>	Resource is assigned a project role of a diff project type when allocated to project– <i>Support case: 51776</i>
<b>Resource Types</b>	
<b>50164</b>	Deleted resource types appear when creating new resource requests from the project resource allocation screen – <i>Support case: 30202, 36467, 37218, 38343, 38493, 39918, 39991, 40114, 40287, 43758, 48609, 49498, 52767, 53034, 54805</i>
<b>50181</b>	When deleting a resource type an error is thrown if the character maximum is reached when appending the "deleted" text – <i>Support case: 38342, 39514, 39849, 40657, 40680, 40684, 40772, 43576, 44925, 46312, 52839, 54158</i>
<b>57466</b>	Email sent to resource manager when they reallocate a user in Team Manager – <i>Support case: 53589</i>
<b>Tasks</b>	
<b>49434</b>	Attempting to view tasks in the outline view causes exception. – <i>Support case: 37726, 38385, 41518, 41901, 46401, 47229, 47911, 50341, 54935, 55016, 55087, 55293</i>
<b>57559</b>	Deleting summary tasks locks up browser – <i>Support case 54078, 54347</i>
<b>Templates</b>	
<b>48670</b>	Attempt to Generate Project from Project Request & Template Causes Error – <i>Support case: 27162, 27217, 28832, 31008, 31015, 31834, 33002, 33313, 33751, 35922, 36405, 38649, 38867, 42496, 42528, 42600, 42606, 42637, 43041, 43091, 43125, 44089, 44359, 46481, 48642, 50555</i>
<b>Web Services (Business Services)</b>	
<b>57788</b>	Error when updating user profile using web services 1.0 – <i>Support case 55104</i>

## Known Issues

Known issues are issues identified too late to be fixed in the current release.

### Daptiv PPM Known Issues

The Daptiv Fall '09 release of **PPM** includes the following known issues.

Area	Issue ID	Summary
<b>Administration</b>		
	<b>57858</b>	Changing the email address of an imported user can cause an exception error.
<b>Custom Fields</b>		
	<b>57941</b>	Updating a task that includes a numeric cross-reference field (Issue ID for example) can cause an error.  Workaround: Do not use numeric values for cross-reference fields.
<b>Dynamic Applications</b>		
	<b>57879</b>	Dividing by 0 (zero) in a calculation field gives results as if you divided by 1 rather than displaying an error.  Workaround: Avoid dividing by 0 where you can control this.
<b>Gantt</b>		
	<b>57974</b>	Copying and pasting multiple tasks when the duration is long (400+ days) can cause a timeout.  Workaround: Copy/paste the tasks individually.
<b>Notifications</b>		
	<b>57884</b>	Adding a document with large numbers of users (250) on the Notifications & Permissions list can cause the add to fail.  Workaround: Do not select large numbers of users for the Notifications & Permissions list.
<b>Tasks</b>		
	<b>49361</b>	Planned Labor revenue is not always accurately displayed.
	<b>56688</b>	Last Update Notes field sometimes displays resource key codes rather than correct update notes.

<b>Tasks (continued)</b>	
<b>57971</b>	<p>Adjusting a project schedule can time out if there are large numbers (1000+) tasks in the project.</p> <p>Workaround: Do not click “Yes” when prompted with the offer to automatically create a baseline and adjust the schedule. Editing individual tasks will adjust them appropriately.</p>
<b>57932</b>	<p>Expanding multiple summary tasks in outline view can more than a minute to open in large projects.</p> <p>Workaround: Avoid expanding multiple summary tasks if your project has large numbers of tasks.</p>
<b>User Experience</b>	
<b>54313</b>	<p>When a user changes their own email address, they can no longer log in.</p> <p>Workaround: The administrator must reset the password.</p>

## Daptiv Scrum Known Issues

The Daptiv Fall '09 release of **Scrum** includes the following known issues.

<b>Scrum</b>	
<b>57940</b>	Publishing does not save a required a lookup field as required when the field links to Projects.
<b>57771</b>	<p>Publishing a solution with a date field set to User's Current Date, if the user's culture setting is configured for a culture that uses dd/mm/yyyy date format causes an error.</p> <p>Workaround: Use a culture setting that uses a mm/dd/yyyy date format.</p>
<b>57660</b>	Very large calculated or aggregated values (greater than 18 digits preceding the decimal) cause an error.
<b>57919</b>	Very large calculated or aggregate values (greater than 18 digits preceding the decimal) cause an error in application list views.
<b>57926</b>	Calculation fields producing very large results cause a conversion error and loss of the application.
<b>57929</b>	<p>In rare cases, deleting an application field in the solution designer can cause a javascript error.</p> <p>Workaround: Cancel out of the solution designer and go back into it.</p>
<b>57952</b>	<p>Saving a copy of a custom view with a name longer than 100 characters cause an error.</p> <p>Workaround: Limit the length of a view name to fewer than 100 characters.</p>
<b>57967</b>	<p>Custom views that include the root field linked to itself (with a related list, for example) do not display that item as the first field in the view.</p> <p>Workaround: In a custom view, do not include a field that is linked to itself.</p>
<b>57921</b>	<p>In a small number of specific cases, a custom view in a related list that links to projects can cause a browser hang. The larger the number of projects included in the view, the more likely this is.</p> <p>Workaround: Use a custom view that limits the number of displayed projects.</p>

<b>Scrum</b> (continued)	
<b>57914</b>	Application item details can display an incorrect currency symbol if there is a link to a project and the user's culture is switched after the solution is published.
<b>57880</b>	Application item details can display the Update Notes as XML when a project is linked to the item.
<b>57881</b>	Application item details show an ID rather than a project request name when the item is linked to a project.
<b>57924</b>	Application item details can display blank Approval Notes when a project is linked to the item.
<b>57774</b>	If an application field has the same name as a native ID field (application name is Feature and field is Feature ID, for example), report queries cannot be joined on that field.
<b>57922</b>	Changing a lookup field from a project reference to an application reference causes the lookup to show as blank in the solution designer (reference reverts to Project").  Workaround: Delete the lookup and re-add it.
<b>57935</b>	Changing an application field name is not always correctly reflected in reports.

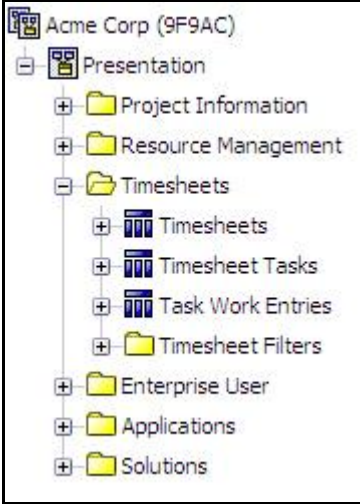
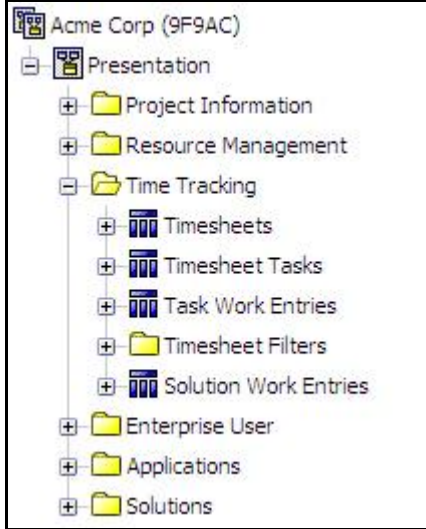
## Appendix

### Data Model Changes

In the Daptiv Reporting Data Model, the top-level **Timesheets** folder has been renamed to **Time Tracking** to better reflect the contents of the folder.

*There is no impact to existing or new reports.*

#### How this change affects the Data Model

Prior to Fall '09	As of Fall '09
	
<p><b>Note:</b> The top-level <b>Solutions</b> folder only appears for enterprises that include Daptiv Scrum.</p>	<p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>• The top-level <b>Solutions</b> folder only appears for enterprises that include Daptiv Scrum.</li> <li>• The <b>Solution Work Entries</b> query subject in the <b>Time Tracking</b> folder only appears for enterprises that include Daptiv Scrum.</li> </ul>

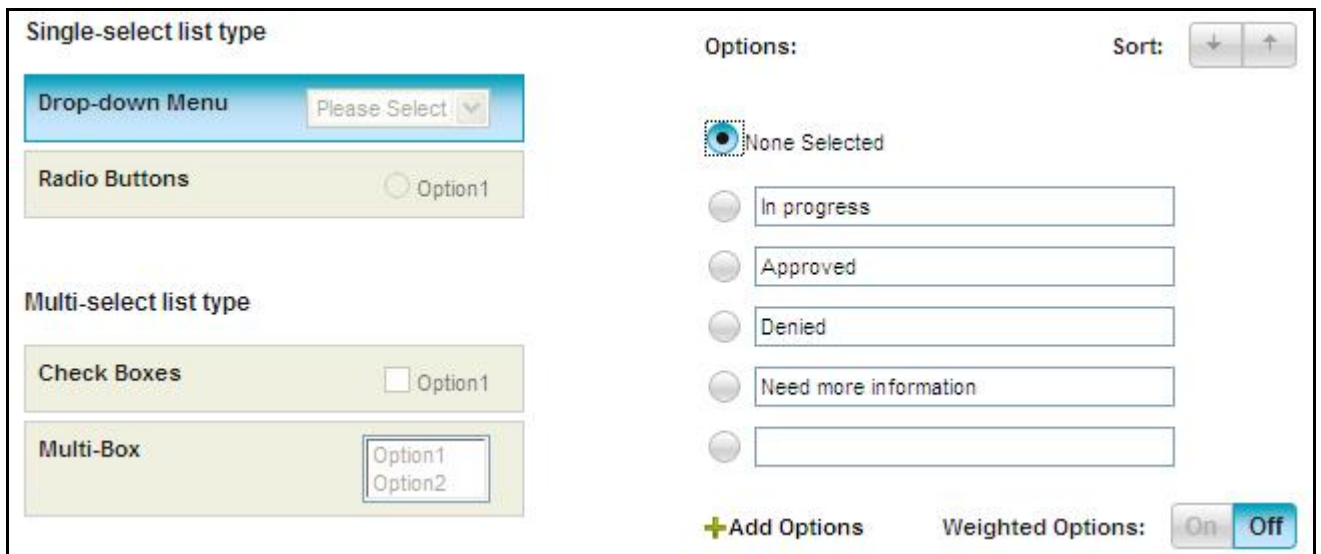
### Custom Pick Lists

Custom pick lists using the Drop-down Menu format now include a “---Please Select---” display option. When no default option is specified, this option displays to users. If the list is required (the user must make a selection), the “---Please Select---” option does not satisfy the selection criteria and the user will be forced to select an option.

“---Please Select---” displays to the user but does not appear as an option when creating or editing the pick list. It cannot be removed from the pick list. The option does not display in list views or reports and is not available for filters in either list views or reporting.

#### How it works

Create a **Drop-down Menu** type pick list:



When selecting an option the user sees a “---Please Select---” option in addition to the defined options:



**Note:** “---Please Select---” is always the first option in the list. If no default option is specified when the list is created, “---Please Select---” is displayed.

**Impact to users**

Existing pick lists using the drop down format and including customer-created options like “--- **Please Select** ---” will have multiple similar options. The first option (“---**Please Select**---”) is the system default option. Any other options with similar wording are options added by the pick list creator. To eliminate confusion, an administrator or dynamic application creator should edit the pick lists and remove these customer-created options.

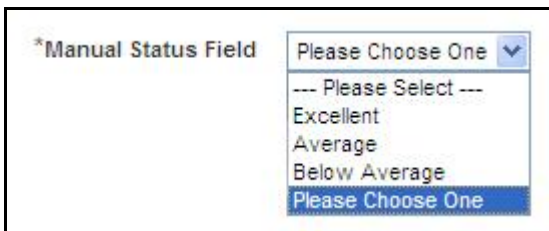
**Example:**

An existing pick list “Manual Status Field” includes a default option of “**Please Choose One**”.

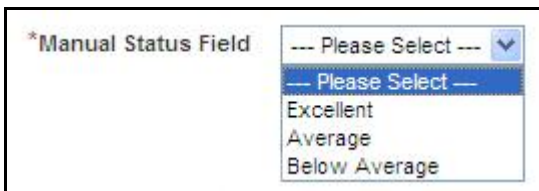
- The list options **before Fall '09** update:



- List options **after Fall '09** update:



- List options **after Fall '09 and editing** by administrator:



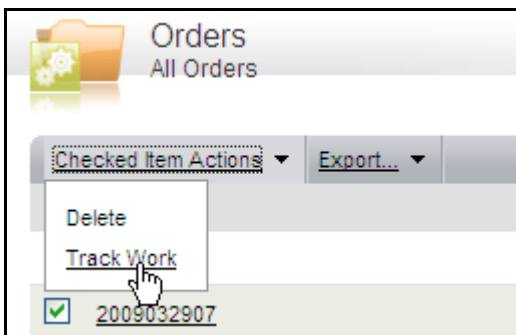
## Using Time Tracking in Scrum

### How it works

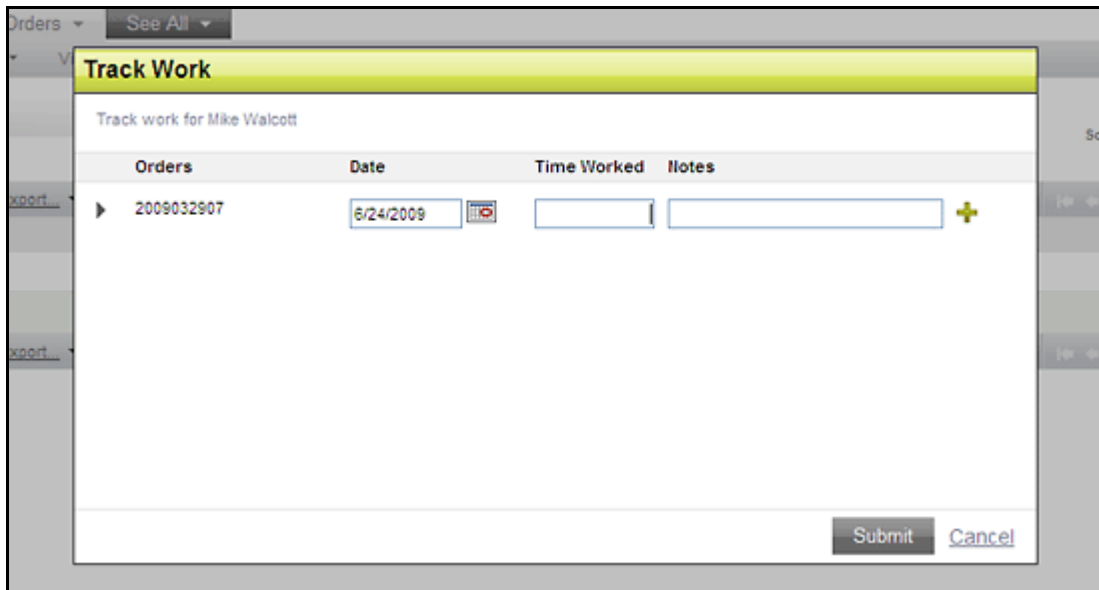
To add work to an application item in Daptiv Scrum navigate to a list view that includes the application item(s) to which you want to add work.

### TO ADD WORK TO AN ITEM:

1. In a list view for an application, select one or more of the items to which you want to add work.
2. Click **Checked Item Actions** and **Track Work**:



The Track Work window opens.



3. Type the date for which you want to add work, or click the Calendar icon to select a day.  
**Note:** The **Date** defaults to the current date.

4. Type the time worked in **Time Worked**.

You can enter time in two ways:

- As a decimal number of hours (1, 1.5, 6.25)
- As hours and/or minutes with a qualifier (1h, 1 h 30m, 90m, 6h 15m)

Note: The time you enter is always displayed as hours and minutes in the listing of time entries:

Sales Representatives	Date*	Time Worked*	Notes
▼ Sam	6/24/2009	<input type="text"/>	<input type="text"/>
	6/24/2009	4h 0m	store room
	6/23/2009	8h 0m	
	6/22/2009	8h 0m	

Submit [Cancel](#)

5. Type any notes you want to add about the work you are adding.

6. Click **Submit** to save the work.

## Using Calculated Fields in Scrum

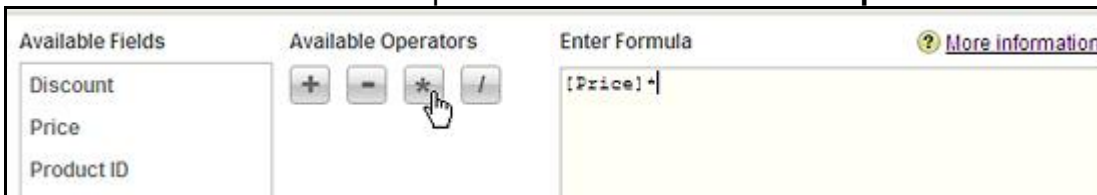
Add calculation fields to Daptiv Scrum applications and use them to display the results of basic mathematical functions performed on data in the application.

### How it works

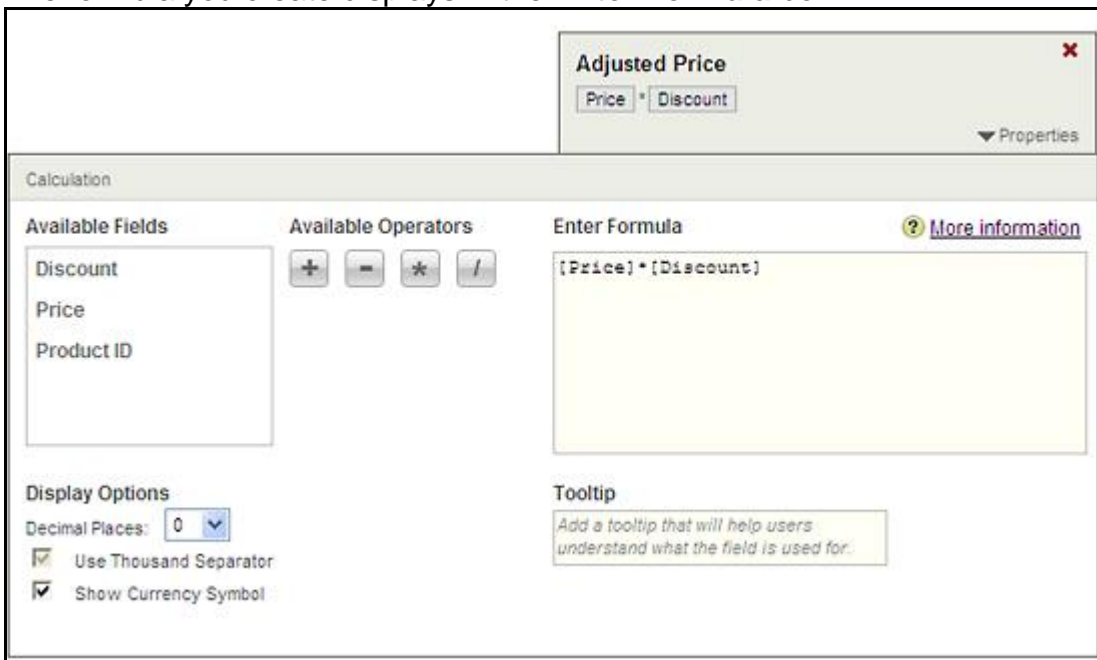
Solution designers can add a calculation field to an application and configure it to display the results of basic mathematical operations performed on other numeric fields in the same application.

### TO ADD A CALCULATION FIELD (FOR SOLUTION DESIGNERS):

1. In the Solution Designer, in a Daptiv Scrum, add a calculation field to an application.
2. In the Properties of the field, build a formula by selecting numeric fields from the **Available Fields** list and mathematical operators from the **Available Operators** list.



The formula you create displays in the **Enter Formula** box.



**Note:** You can also type the formula by hand.

The field displays a read-only value to the user. For more information, see the Online Help for Daptiv Solutions.

## Using Custom Views in Related Lists and Lookup Fields

You can choose an existing custom view to display a list of items when you are adding data to a related list or lookup field in Daptiv Scrum. This provides flexibility, giving you the ability to see items ordered or sorted as you have specified. The view you select persists until you select a different one, even if you log out of Daptiv.

### How it works

When you add data from a related list or a lookup field, available application items are displayed in a view defined by the solution designer. This default view may not be the best one from which to select items.

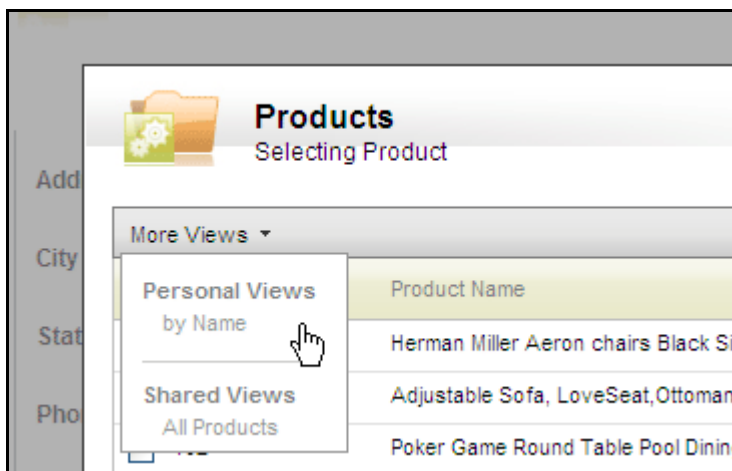
### TO CHANGE THE VIEW OF AVAILABLE ITEMS:

1. In the details of an application item:

- In a related list, click **Add <item>s**  
or
- In a lookup field, click **Insert Data**.

A list of available items opens.

2. At the top of the list, click **More Views** and select another custom view:



**Note:** The views listed are the views available to you in the application whose items you are viewing, not the application to which you are adding data.

For more information, see the Online Help for Daptiv Solutions.

## Using Project Links in Related Lists and Lookup Fields

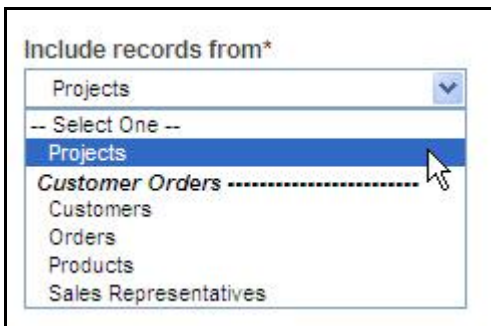
You can choose a project when you are adding data to a related list or lookup field in Daptiv Scrum. This gives you the ability to associate application items with projects, and to display project data in application items.

### How it works

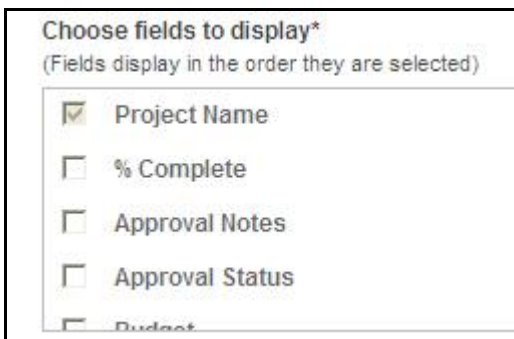
Solution designers can select a **Projects** option when configuring a related list or lookup field. With this option selected, users add projects when they create or edit an item in the application.

### TO CONFIGURE A LINK TO PROJECTS:

1. In the Solution Designer, in Daptiv Scrum, add a related list or lookup field to an application.
2. In the properties for the field, select **Projects** from the **Include records from** list.



3. If you are configuring a related list, select the project field(s) you want to display in the list. **Project Name** is selected by default and cannot be unselected.



**Note:** If you are configuring a lookup field, the only available field is **Project Name**.

The user can select a project (in lookup fields) or projects (in related lists) to link to their application data. For more information, see the Daptiv Solutions Online Help.