

RELEASE NOTES

Version 5.5

These notes provide an overview of the changes in the Principal Toolbox® in respect to the previous release (release 5.2).

Important: Upgrade to version 5.2.0 before installing version 5.5.0

Minor Changes and Fixes:

Nr	Version solved	Description
PT-191	5.2.5.0.5627	It is now possible to export timeline data as pivoted table to MS Excel.
PT-591	5.2.5.0.5588	It is now possible to create a filter based on the field Mandatory.
PT-1131	5.2.5.0.5598	Headers on longs lists will now remain visible while scrolling down.
PT-1229	5.2.3.0.5544, 5.2.0.14.5495	Changes on projects, programmes and portfolios are now tracked on a history page.
PT-1396	5.2.0.0.5397	An issue has been fixed, where the application did not respond after setting a new baseline.
PT-1445	5.2.0.3.5410, 5.2.1.1.5432, 5.2.2.0.5431	The 'My Document Folders' listing on the homepage now only lists document folders where the logged in user is explicitly assigned as 'Document Coordinator', 'Document Author' or 'Document Reader' (using the 'edit members' button on the document folder).
PT-1500	5.2.0.4.5414, 5.2.1.1.5434, 5.2.2.0.5438	An issue has been fixed where it took long to copy listings to the Windows Clipboard.
PT-1506	5.2.0.3.5411, 5.2.1.1.5433, 5.2.2.0.5432	An issue has been fixed where it took long to run the report 'Project Resources' on the Enterprise level.
PT-1543	5.2.2.0.5452	An issue has been fixed where cumulative values in Timeline Reports were not always correct.
PT-1561	5.2.0.18.5524	An issue has been fixed where date fields entered with copy-paste on the Project Dashboard were not saved.
PT-1573	5.2.5.0.5588	Activity planning trees with more than 25 levels deep can present unexpected behaviour. Recommended to keep trees under the 25 levels.
PT-1579	5.2.0.14.54995 .2.3.0.5550	An issue has been fixed where a table in a MS-Word report contained the word <thread>.
PT-1614	5.2.2.0.5500	New users have no activities section on their home page by default (selected option: 'Do not show activities on my home page').
PT-1615	5.2.3.0.5545	In timeline reports it is now possible to dynamically start a date range at the beginning of last year.
PT-1632	5.2.2.0.5499	Start- and end dates of Single Sheet Projects are now editable.
PT-1644	5.2.2.0.5518	Entry details (costs and hours) on the project are only visible to the project manager and system administrator.

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PT-1649	5.2.2.0.5519	An issue has been fixed where it was not possible to add new Named Users after the license limit was reached.
PT-1672	5.2.0.14.5501, 5.2.3.0.5552	An issue has been fixed where the Active Stage was not determined correctly after removing the Finished mark of a product in a previous stage.
PT-1687	5.2.0.10.5456	An issue has been fixed where the Keyword List for Automated Reports stayed empty.
PT-1695	5.2.0.14.5497, 5.2.3.0.5547	An issue has been fixed where an error was displayed when moving a project in the Gantt editor.
PT-1711	5.2.0.12.5466 5.2.2.0.5500	Performance of the filter page of logs (issues, risks, actions, etc.), projects and portfolio projects has been improved.
PT-1743	5.2.4.0.5579	Support for Microsoft Internet Explorer 9 has been added.
PT-1821	5.2.7.0	NOTE: The database optimisation requires version 5.2.0 and will fail when attempting to install on a prior version. Upgrade to version 5.2.0 before installing this feature.
PT-1855	5.2.4.0.5572, 5.2.0.16.5514	An issue has been fixed where the date fields of an item were emptied when moved to a newly created project stage.
PT-1864	5.2.0.19.5539, 5.2.5.0.5627	An issue has been fixed where the selectable targets for external dependencies were inconsistent.
PT-1865	5.2.0.18.5524, 5.2.5.0.5589	Some issues have been fixed regarding the layout of the Project Dashboard page.
PT-1915	5.2.4.0.5585, 5.2.5.0.5586	An issue has been fixed where the password of a newly created user was not displayed in the confirmation e-mail.
PT-1934	5.2.0.19.5535	An issue has been fixed to make the field "Entry Costs" always available on cost and hour entries. For example in the add-on 'Integration Dashboard' where it's necessary for importing cost entries.
PT-1949	5.2.0.18.5528, 5.2.5.0.5600	The application performance has been increased significantly when using Microsoft SQL Server 2008.
PT-1952	5.2.8.0.5712	An issue has been fixed where the selection of sub items within a view filter did not work properly.
PT-1982	5.2.0.19.5536	An issue has been fixed where dates that were entered manually were not interpreted correctly.
PT-1997	5.2.0	An issue has been fixed where the column Phase was not filled in Timeline reports.
PT-2006	5.2.8.0.5692	It is now possible to allow Programme Managers to edit underlying programmes and projects.
PT-2027	5.2.6.0.5648	To successfully update the application to version 5.2.6 or later there should be enough free disk space on the hard disk used by the database server. The free space required should be at least twice the size of the database. Also during the update procedure the recovery mode should be set to simple. As always a full database backup must be made before the update procedure can start. The minimum required version for upgrading is 5.2.0.
PT-2040	5.2.8.0.5695	It is now possible to disable starting of projects from within programmes. When configured, projects can only be started from within a portfolio.

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PT-2049	5.2.0.26.556, 5.5.0.0.5713	It is now possible to monitor page loading times.
PT-2055	5.2.7.0.5663	Several layout issues have been fixed.
PT-2060	5.2.8.0.5684	It is now possible to enable a tab on Enterprise, containing all Lessons Learned items visible to all users.
PT-2062	5.2.0.21.5549	An issue has been fixed where dates in the project dashboard were not saved.
PT-2068	5.2.4.4	An issue has been fixed where traffic lights based on custom fields did not respond as expected.
PT-2089	5.2.4.4	An issue has been fixed where the update from 5.2.0.19 to 5.2.4.3 was not possible.
PT-2090	5.2.0.21	Manually configured 'PersonDisplayName' config is now also applied to existing persons.
PT-2111	5.2.8.0.5681	Hour rates can now be changed, removed and are extended with a financial category to allow the associated costs to be categorised financially.
PT-2124	5.2.8.0.5700	It is now possible for users to enter the Support Portal from within the Principal Toolbox.
PT-2146	5.2.8.0.5711	An issue has been fixed where entries created in Portfolio did not show on Project reports.
PT-2179	5.2.8.0.5711	An issue has been fixed where possible decisions on risks were not PRINCE2-compliant.

Portfolio Management:

Nr	Version solved	Description
PT-953	5.2.0.0.5392	It is now possible to define Portfolio Dashboards, on which a selection of projects can be shown for a selected group of users.
PT-1117	5.2.4.0.5580	It is now possible to send an e-mail notification when submitting a portfolio report request.
PT-1126	5.2.4.0.5573	When creating a report request, the default value of the field 'status per' is now derived from the timescale of the financial grid.
PT-1281	5.2.8.0.5712	Figures in Financial grids are now displayed based on locale settings.
PT-1310	5.2.4.0.5565	An issue has been fixed where the message "Too small Grid Size" was displayed on the Portfolio Report page.
PT-1332	5.2.1.0.5415, 5.2.0.13.5489	In the Portfolio Report financial grid, entries of type Actual are now editable throughout the entire current period.
PT-1345	5.2.1.0.5413	The configuration of the financial grids has been changed, so it now reflects the business processes much better.
PT-1421	5.2.1.0.5401	A new type of financial entry is introduced: Reserved.
PT-1436	5.2.5.0.5593	It is now possible to hide the Time scale columns on the Financial tabs.
PT-1488	5.2.2.0.5461	The configuration of the Portfolio Report model now depends solely on the configuration of the Portfolio it belongs to. It no longer depends on the configuration of the Portfolio Model.
PT-1491	5.2.2.0.5449	When an Idea is created, a Project Manager is no longer selected by default. Also, an assigned Project Manager is editable until the Project starts.
PT-1512	5.2.0.4.5414, 5.2.1.1.5434,	An issue has been fixed, where the start and end dates of a Portfolio Project were not updated in the Portfolio Gantt after a new item was added.

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	5.2.2.0.5433	
PT-1570	5.2.1.2.5450	Cost and Hours entries are now associated with the proper Portfolio, depending on its financial configuration.
PT-1619	5.2.0.9.5452, 5.2.2.0.5488	An issue has been fixed where existing views on Portfolios did not run on Portfolio Dashboards.
PT-1638	5.2.2.0.5499	Start and End dates of Ideas are now editable on the Portfolio dashboard and the Detail screen.
PT-1748	5.2.0.14.5496 5.2.3.0.5545	An issue has been fixed where imported Portfolio Projects were not shown on the Portfolio Gantt.
PT-1773	5.2.0.13.5488, 5.2.2.0.5534	An issue has been fixed where the Financial year starting on the 1st of July was a year ahead.
PT-1840	5.2.3.0.5554	An issue has been fixed where an ampersand ('&') in a project name caused an error in the Portfolio Gantt.
PT-1860	5.2.0.16.5517, 5.2.4.0.5582	It is now possible to create reports on Portfolio Dashboards.
PT-1879	5.2.4.0.5584	An issue has been fixed where the project model of a Single Sheet Project could not be changed if it was started from within a portfolio.
PT-1908	5.2.0.17.5520, 5.2.4.0.5583	An issue has been fixed where the Properties tab on Portfolio Dashboards was not visible.
PT-1922	5.2.0.19.5535	An issue has been fixed where project managers were not able to add financial categories to a portfolio report.
PT-1924	5.2.5.0.5611	The performance of the Financial grid on Portfolio Management has been improved.
PT-1946	5.2.4.0.5590, 5.2.5.0.5596	An issue has been fixed, where the filter settings on Portfolio Dashboards returned too many results.
PT-2010	5.2.8.0.5697	In the Financial Grids, it is now possible to set a Forecast Start Date. Before this date entries of type Actual are visible, after this date entries of type Forecast are visible. This replaces the existing 'Year-to-Date until' date.
PT-2011	5.2.6.0.5642	The Financial Configuration now supports the EAC (Estimate-at-Completion) forecast process.
PT-2012	5.2.6.0.5631	Financial entries now have a book date set to the first date of the applicable period.
PT-2020	5.2.5.1.5631, 5.2.6.0.5636	An issue has been fixed where Microsoft Internet Explorer 8 showed multiple messages 'Stop running this script?' during the generation of the Financial grid on Portfolio.
PT-2029	5.2.5.1.5631	An issue has been fixed, where an error was reported when the timescale Quarters was selected on any Finance grid.
PT-2124	5.2.8.0.5700	It is now possible for users to enter the Support Portal from within the Principal Toolbox.
PT-2129	5.2.8.0.5704	Portfolios do not have a forecast start date anymore. Forecast start dates only apply to projects.
PT-2144	5.2.0.22.5556	An issue has been fixed where entries entered at Portfolio were not visible to Project Managers.

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Nr	Version solved	Description
PT-2197	5.2.8.0.5711	An issue has been fixed where saved versions of Portfolios did not show projects.

Resource Management:

Nr	Version solved	Description
PT-111	5.2.2.0.5461	A discussion between Project Manager and Resource Pool Manager is now supported.
PT-1128	5.2.2.0.5439	It is now possible to generate a report on a Resource Pool containing the Actual entries.
PT-1392	5.2.1.1.5445	It is now possible to assign Resources to Resource Categories.
PT-1493	5.2.2.0.5501	It is now possible to define Resource Categories on Timeline Fields. It is also possible to report on Resource Categories.
PT-1652	5.2.1.8.5489, 5.2.2.0.5479	An issue has been fixed where entries from Resource Allocation were not properly associated with their respective portfolios.
PT-1759	5.2.0.12.5478, 5.2.1.8.5492, 5.2.2.0.5519	An issue has been fixed where Resource Allocation data of multiple persons on a single project was not saved correctly.
PT-1876	5.2.0.17.5519, 5.2.5.0.5586	An issue has been fixed where the dropdown list for hour rates also contained conversion units.
PT-1911	5.2.0.18.5528, 5.2.5.0.5611	An issue has been fixed where no result was returned when filtering on a Skill.
PT-1957	5.2.4.1.5592, 5.2.5.0.5605	An issue has been fixed where it was not possible anymore to add or remove resources to or from a Resource Pool.

Managing Successful Programmes:

Nr	Version solved	Description
PT-1999	5.2.0+	An issue has been fixed where overdue products in MSP programmes were not calculated during the nightly tasks.

Timesheets:

Nr	Version solved	Description
PT-962	5.2.1.0.5407	It is now possible to specify a custom Entry field to be filled on the Timesheet.
PT-1326	5.2.4.0.5588	Update step added, called: 'CalculateNewTimesheetHelperFields'. This update step sets the Outline Level field values for products, stages, work packages and activities and can take a while.
PT-1407	5.2.0.0.5393	An issue has been fixed where a custom field on a Timesheet could not be filled anymore.
PT-1565	5.2.0.7.5430, 5.2.1.7.5481, 5.2.2.0.5477	An issue has been fixed where rows entered in a Timesheet were duplicated.
PT-1575	5.2.8.0.5693	It is now possible for external users to use Time Entry.

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PT-1616	5.2.4.0.5578	It is now possible to define a mandatory custom field on a Timesheet.
PT-1676	5.2.0.10.5453, 5.2.2.0.5495	An issue has been fixed, where opening a Timesheet from an e-mail link did not work correctly.
PT-1696	5.2.0.14.5497, 5.2.3.0.5549	Important: All existing non-standard (customer-) views will now show Timesheets with all possible statuses, because the built-in fixed filter has been removed (this used to include: new, concept and rejected Timesheets). The standard view has not been changed, but is now editable.
PT-1716	5.2.0.14.5496 5.2.3.0.5545	An issue has been fixed where the remarks of the Timesheet approver were not saved.
PT-1746	5.2.0.12.5478, 5.2.2.0.5519	An issue has been fixed where actual entries contained an export date before export.
PT-1768	5.2.0.17.5522, 5.2.4.0.5586	An issue has been fixed, where hours submitted for approval for MSP-projects were not visible on the Home page tab 'Approve hours'.
PT-1777	5.2.0.14.5495, 5.2.3.0.5544	An issue has been fixed, where Timesheets could be submitted without product selection.
PT-1812	5.2.0.15.5507, 5.2.4.0.5567	An issue has been fixed where e-mails sent from a Timesheet were sent to all Time Entry Coordinators instead of only the Coordinators of the current Time Entry Group.
PT-1819	5.2.0.15.5505, 5.2.4.0.5564	An issue was fixed, where new Timesheets were generated after the user was removed from a Time Entry Group.

Integration Dashboard:

Nr	Version solved	Description
PT-1238	5.2.5.0.5606	The Integration Dashboard has now been modified to work with a server root location for file import and export. This allows restricting access to server locations.
PT-1343	5.2.1.0.5426	Several new options are introduced when importing entries. It is now possible to ignore entries that already exist. It is also possible to first create a contra entry, and then import the new entry. It is now also possible to import the field 'Description'.
PT-1563	5.2.4.0.5588, 5.2.5.0.5588	It is now possible to define security roles on the Integration Dashboard.
PT-1778	5.2.3.0.5545	It is now possible to ignore entries without values during import. Please note that entries with value "0" (zero) will be imported.
PT-1899	5.2.4.0.5586	An issue has been fixed where an import task failed without logging on an invalid import file.
PT-2050	5.2.8.0.5690	It is now possible to import Entries that contain both Money and Hours values.
PT-2138	5.2.8.0.5688	When executing an Entry import, it is now possible to automatically remove the previous import.

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Microsoft Excel reporting:

Nr	Version solved	Description
PT-1534	5.2.1.1.5438, 5.2.2.0.5439	An issue has been fixed where some data in an Excel report was represented by its internal ID instead of its name.
PT-1786	5.2.3.0.5554	An issue has been fixed, where generating a Microsoft Excel report took very long.
PT-1984	5.2.0.20.5542 5.2.7.0.5657	An issue has been fixed where baseline data on Stages and Work Packages was not visible in Microsoft Excel reports.

Advanced Customisation & Workflow:

Nr	Version solved	Description
PT-1431	5.2.0.3.5409, 5.2.1.0.5426	It is now possible to show Portfolio Dashboards on the Home Page.
PT-1783	5.2.0.14.5497, 5.2.3.0.5547	An issue has been fixed where it was not possible to edit off-screen content in the Page Layout Editor, because scrolling down was not possible.
PT-1881	5.2.0.18.5522, 5.2.5.0.5586	An issue has been resolved, where usernames in a non-standard format were displayed as [no name].
PT-1883	5.2.5.0.5593	The listing 'Documents & Knowledge' on Enterprise level now includes the columns 'Approval Status' and 'Review Requestor'.
PT-2068	5.2.4.4.5600, 5.2.5.1.5633, 5.2.6.0.5648	An issue has been fixed where conditions defined on custom fields were not always evaluated in the correct order.
PT-2110	5.2.8.0.5701	An issue has been fixed where values of custom fields were not calculated properly in rare conditions.

Full Text Search:

Nr	Version solved	Description
PT-1769	5.2.3.0.5542	An issue has been fixed where the application became unresponsive when searching on the Project Document tab in Microsoft Internet Explorer 8.

Windows Security Integration:

Nr	Version solved	Description
PT-2063	5.2.0.22.5553, 5.2.8.0.5672	It is now possible to use any user field for synchronisation with LDAP.

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