

# Principal Toolbox®

## Principal Toolbox 4.1

These notes provide an overview of the changes in the Principal Toolbox® in respect to the previous release (4.0, Spring 2007).

Feature	Description
Multi-language support	The user interface supports different languages (per user or system wide). Languages currently supported are English (UK), Dutch and German.
Excel reporting	Improved functionalities: <ul style="list-style-type: none"> <li>- Support for users behind authenticated firewalls (multiple SOAP connectors).</li> <li>- Support for users with multiple instances of the application. (multi-instance reporting).</li> <li>- View definitions can be included in the Excel templates so distributing reports becomes easier.</li> <li>- Import functionalities for existing Excel templates.</li> <li>- Support for merged Excel cells.</li> </ul>
Cross programme dependencies	Dependencies between products can be created across programmes rather than only between projects of a single programme. The programme Gantt shows both these dependencies.
Printable product breakdown	The product breakdown can be printed in sections or downloaded as PDF document.
Project tolerances	Support for current stage end date tolerances besides the existing product based tolerances (number of products overdue). Tolerances can be applied to the current stage only or for the whole project (default).
Chart reporting	All information within the system can be represented in a graphical chart. Supported chart types are line, bar, area and pie.
User administration	The user administration has been changed in respect to the email generation and password policies: <ul style="list-style-type: none"> <li>- Passwords are sent by the application directly (instead of via the email client of the administrator).</li> <li>- Option to require a 'strong' password.</li> <li>- Password expiration period.</li> <li>- Reset procedure for user password (by administrator).</li> </ul>
Column width	Column width at reports is referenced by a value for easier alignment of views (see column width at reports).
Enriched text editor	On dashboard pages and on multi-line text fields an enriched text editor is available (for text formatting).



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Feature	Description
Customisation	<p>The custom fields have been extended with following options:</p> <ul style="list-style-type: none"> <li>- Custom fields may be 'categorised' to enable grouping:               <ul style="list-style-type: none"> <li>o at the page layout to group fields of the same category into the same page section;</li> <li>o at the column selection and filtering and grouping of column headings (see advanced options at reports).</li> </ul> </li> <li>- Custom field descriptions are shown on the column heading.</li> <li>- Small usability and performance improvements.</li> </ul>
LDAP integration	<p>The user administration can be integrated with any LDAP user store. The LDAP store can also be used for authentication of users (next to basic authentication or 'domain' authentication).</p>
Currencies (costs)	<p>Currency values (costs) can be configured to show a custom number of decimals (default remains two).</p>

## Add-ons:

Feature	Description
Portfolio management <sup>1</sup> "NEW"	<p>Portfolio management provides the possibility to report and manage projects and programmes across the organisation and evaluate their contribution to the business strategy goals.</p>
Time sheets	<p>Time entry has been extended with the following functionalities:</p> <ul style="list-style-type: none"> <li>- Multiple sections with subtotals can be defined.</li> <li>- Rows can show an extra product field. (e.g. hours budget).</li> <li>- Support for 'direct editing' mode on open time sheets.</li> <li>- Automatic approval on submitted time sheets.</li> <li>- For easy time reporting product references for last week.</li> <li>- Availability of automated reports.</li> <li>- Time sheets will include product references that were booked on in the previous week.</li> <li>- Time sheets may show an extra row of hours that a user has to account for.</li> </ul>
Resource capacity planning	<p>Resource capacity planning has been extended to support resource groups (next to skills). Assignments can now be related to a group, plan board or skill. Reports can be created to view group allocation, perform availability analysis and more.</p>
Integration dashboard	<p>The integration dashboard has been extended to support updates on imports, free CSV formatting imports and email notification. Furthermore, imports can be done on multiple types of data. To support all new functionalities the page layout has been improved.</p>

<sup>1</sup> Note that the term portfolio was previously used for a 'programme' with projects only. These 'programmes' are now called 'project lists'.



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## Important Fixes:

Issue	Description
1015	Issues of an MSP programme were not included on the programme report.
1276	When the time zone on the application server differed from the time zone of the client, the Gantt chart shows a javascript error and fails to show the Gantt correctly.
1752	Remarks on row entries at the time sheet were set as description on the resulting cost/hour entries instead of remarks.
2009	Assignments with a value of less than 1 hour a day were shown incorrectly on the resource plan board.
2028	Work packages exist in project plan but cannot be removed. Relations between these work packages and the project plan are corrected on editing / saving the project plan.
2034	Cost / hour entries of type budget are added as budget as well as actual.
2043	When changing actual dates from any date to nothing (empty), the depending calculations were not triggered.
2049	A maximum of 50 members could be assigned to a project.
2053	Owner of a product may add cost/hour entries on a product. Owners should not be able to add cost/hour entries. Only project managers are allowed to do so.
2243	Sorting on project manager failed if multiple project managers were assigned to a project.
2264	Local costs fields of project are visible when the add-in local currency support is not available.
3003	The planning status field on products did not show any value on (automated) reports.
3005	The Microsoft Project add-in did not support SSL connections.

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



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