

opentext™

Project and Portfolio Management Center

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APM for PPM Release Notes

<https://admhelp.microfocus.com/ppm/>



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Installation Notes

This section describes the system requirements that must be met before installing APM for OpenText™ PPM and how to install APM.

Server-Side and Client-Side System Requirements

Before you install APM, make sure that your system meets the minimum requirements.

Server-Side Requirements

APM for PPM requires the following server-side components:

- PPM Center version 9.6x.

Note: APM server-side requirements are the same as the server-side requirements for PPM Center version 9.6x.

For information about PPM Center server-side requirements, see the *System Requirements and Compatibility Matrix* for PPM Center.

For information on how to install PPM Center <PPM_Version>, see the Release Notes for PPM <PPM_Version>.

Client-Side Requirements

Client-side products and environments for APM and PPM Center 9.6x are the same except for the following components required by APM.

The following components are required for the PPM Data Migrator for Microsoft Excel (Data Migrator):

- Microsoft Office Excel 2007 SP2 or 2010
- Microsoft .NET Framework 4 or .NET Framework 4 Client Profile

- Visual Studio 2010 Tools for Office Runtime
- 2007 or 2010 Microsoft Office Primary Interop Assemblies
- Microsoft Visual Basic Power Packs 10.0

The following component is required for dynamic graphing:

- Microsoft Silverlight add-on for Microsoft Internet Explorer or Silverlight Plug-In for Mozilla Firefox

Note: If you attempt to run the Data Migrator or dynamic graphing without installing the required components, you are required to install these components later.

For information about PPM Center client-side requirements, see the *System Requirements and Compatibility Matrix* for PPM Center.

Preparing for Installation

To prepare for installation of APM:

1. Obtain the APM software.
2. Collect the following information, which is required during the installation procedure:
 - PPM Center administrator user name
 - PPM Center administrator password
 - PPM Center database schema password
 - PPM Center database TNS name
3. Verify that system requirements have been met. See "[Server-Side and Client-Side System Requirements](#)" on the previous page.
4. Verify that you are not using user data fields in the Request Type User Data. See "[User Data](#)" on page 9 for more information.

Installing APM for PPM

Complete the following steps to install APM on the PPM Server:

1. Back up the database and file system for the PPM Server.
2. Verify that the PPM Server is running.
3. Copy the file `ppm-<ppm_version>-APM.jar` to the **<PPM_Home>** directory. This is the directory where your PPM Center instance is installed.

In cluster environments, copy the file to the **<PPM_Home>** directory on the primary server, and then run the deploy command. You do not need to deploy APM on other servers.

4. Change to the **<PPM_Home>/bin** directory.
5. Start the installation by typing the following command:

```
sh ./kDeploy.sh -i APM
```

6. Follow the on-screen instructions to complete the installation.
7. Stop the PPM Server.
8. Run `kUpdateHtml.sh`.
9. Compile the JSP files using the following command:

```
sh ./kJSPCompiler.sh
```

10. (Optional) Delete PPM Center's cache in the following directories:

```
<PPM_Home>/server/<PPM_Server_Name>/tmp  
<PPM_Home>/server/<PPM_Server_Name>/work
```

11. Add the parameter `APM_ENABLED=true` in the `server.conf` file.
12. Start the PPM Server.
13. Verify the installation. Type:

```
sh ./kDeploy.sh -l
```

where the last character in the command is the lowercase letter "l."

The name APM should appear in the list of installed modules. For example, you should see the following entry:

Deployment	Version	Deployed	Description
APM	<version>	<date and time>	Application Portfolio Management

If you are running PPM Center in a clustered environment, repeat the installation procedure for each PPM Server.

Fixes

APM for PPM 9.6x does not include any fix.

Known Problems, Limitations, and Workarounds

The following problems and limitations are known to exist in APM for PPM 9.60 (or other software, as indicated). The problems are categorized by the affected product area. If a problem has an assigned internal tracking number, that tracking number is provided (in parentheses) at the end of the problem description.

User Data

Problem: When APM is installed, two user data fields are added to the Request Type User Data to help distinguish APM entities from PPM Center request types. The User Data Columns used are USER_DATA19 and USER_DATA20.

User data fields for the Request Type User Data are affected as follows:

- If you are using User Data Columns USER_DATA1 – USER_DATA18, these fields are removed from the request type (however, the data is not lost).
- If you are using User Data Columns USER_DATA19 or USER_DATA20, these fields are overwritten and any data stored in these fields is lost.

Workaround: Before installing APM, verify that you are not using user data fields for the Request Type User Data. If you are using user data fields for the Request Type User Data, do the following:

1. If you are using User Data Columns USER_DATA19 or USER_DATA20, reconfigure them to use different User Data Columns so that your data is preserved.
 2. After installing APM, reconfigure User Data Columns USER_DATA1 – USER_DATA18.
-

Dynamic Graphing

Limitation: In dynamic graphing, when viewing dependencies of more than 2,000 applications, the following error message displays:

Exception of type 'System.OutOfMemoryException' was thrown.

(QCCR1L42231)

Workaround: Load a subset of the applications such that there are less than 2,000 applications displayed in dynamic graphing before trying to view upstream/downstream or direct dependencies.

PPM Data Migrator for Microsoft Excel

Problem: During the installation of the PPM Data Migrator for Microsoft Excel (Data Migrator), the following message displays:

Publisher cannot be verified.

(QCCR1L41307)

Workaround: This message can be safely ignored. Click **Install** to continue installing the Data Migrator.

Problem: When creating an entity with only an identifier in the import spreadsheet, the PPM Data Migrator for Microsoft Excel (Data Migrator) logs a message that the entity was not created. However, the entity is actually created. (QCCR1L42225)

Workaround: Verify the existence of the entity before fixing or recreating it. If the entity has been created, it has a request ID assigned to it. Use this request ID to update the entity.

Problem: For multi-value fields in the import spreadsheet, spaces after the delimiter are considered part of the next value. For example, if the values CAISO; SOX are entered in the spreadsheet, the PPM Data Migrator for Microsoft Excel (Data Migrator) considers the second value as SOX (contains a leading space). (QCCR1L42307)

Workaround: Do one of the following:

- In the import spreadsheet, eliminate spaces after the delimiter in multi-value fields. For example, CAISO;SOX.
 - From the Data Migrator, change the delimiter to include the trailing space.
-

Problem: If you create multiple entities using the same identifier and are using multiple threads, multiple entities with the same identifier are created in PPM Center. (QCCR1L42560)

Workaround: Do the following:

- Verify that the identifiers you are using are unique.
- Use a single thread when creating entities.

If you create multiple entities with the same identifier, if possible, delete the duplicate entities.

Application Portfolio Size Portlet

Problem: The following error message displays in the Application Portfolio Size portlet:

```
This shared portlet cannot be displayed because one or more required preferences are missing. Please contact your dashboard administrator.
```

(QCCR1L42235)

Workaround: The fiscal calendar for PPM Center is not configured for the time period specified in the portlet (that is, the time period falls outside of the

configured fiscal calendar). Update the Period Start and Period Finish dates of the portlet to fall within the dates configured for the fiscal calendar.

My Applications Portlet

Problem: The following error message (only the first portion is shown here) displays in the My Applications portlet:

```
Cannot load this portlet's data because of a misconfigured SQL query. (KNTA-10836) Please contact your administrator with the following information: ...
```

Workaround: The data source for the My Applications portlet should be updated:

1. Open the PPM Workbench.
 2. On the shortcut bar, click **Dashboard > Data Source**.
 3. Click **List**.
 4. Double click **APM - User - My Applications** to open it.
 5. Locate the statement `NV(TBL2.PARAMETER9) = '[SYS.USER_ID]'` and change it to `NVL(TBL2.PARAMETER9, '0') = '[SYS.USER_ID]'`.
 6. Click **Save**.
-

Problem: Applications for which the user is the ITO Contact do not appear in that user's My Applications portlet.

Workaround: The data source for the My Applications portlet should be updated:

1. Open the PPM Workbench.
2. On the shortcut bar, click **Dashboard > Data Source**.
3. Click **List**.
4. Double click **APM - User - My Applications** to open it.
5. Locate the statement `NV(TBL2.PARAMETER9) = '[SYS.USER_ID]'` and

change it to `NVL(TBL2.PARAMETER9, '0') = '[SYS.USER_ID]'`.

6. Click **Save**.

Creating and Managing Business Objectives

Problem: As an APM analyst or administrator, you cannot create or manage business objectives. (QCCR1L42407)

Workaround: In order to create and manage business objectives, you must have the Portfolio Mgmt: Edit All Portfolios access grant. Create a security group that contains this access grant and assign that security group to users who need to create and manage business objectives. See ["Creating and Managing Organization Units" below](#) if you also want to add the ability to create and manage organization units.

Creating and Managing Organization Units

Problem: As an APM analyst or administrator, you cannot create or manage organization units. (QCCR1L42407)

Workaround: In order to create and manage organization units, you must have the Resource Mgmt: Edit Entire Organization or Edit Only Organization Units That I Manage access grant. Create a security group that contains this access grant and assign that security group to users who need to create and manage organization units. See ["Creating and Managing Business Objectives" above](#) if you also want to add the ability to create and manage business objectives.

Accessing Scheduled Services in PPM Center

Problem: If you have the Edit Services Schedules or View Services Schedules access grant but do not have the User Administration license, you may see the following menu items in PPM Center but do not have the ability to execute them:

- Open > Administration > Schedule Services
- Open > Administration > View Services Audit Page (QCCR1L41783)

Workaround: If you wish to view or modify scheduled services in the system, the PPM Center administrator must assign the User Administration license to you in addition to giving you the Edit Services Schedules or View Services Schedules access grant.

Local Language Support

APM for PPM supports English only.