

Deltek Open Plan™ 3.3 Service Pack 2 Release Notes

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Overview

Welcome to Deltek Open Plan 3.3 Service Pack 2 Release Notes. This document contains the following information:

- Pre-Installation Information
- Installation
- For Additional Information
- Open Plan 3.3 Service Pack 2 Enhancements
- Defects Resolved

Pre-Installation Information

Deltek EPM product Compatibility

Open Plan 3.3 Service Pack 2 is compatible with the following EPM products:

- Deltek WelcomHome™ 4.5
- Deltek Cobra™ 4.7 and 5.0
- Deltek WelcomRisk™ 2.8
- Deltek WelcomPortfolio™ 2.8

Open Plan users who are integrating data with these products must ensure that the products are upgraded to the compatible versions.

System Requirements

To run Open Plan 3.3 Service Pack 2 successfully, your system must meet the following requirements:

- A Pentium-based personal computer
- Microsoft Windows XP or Windows 2003 and later
- The following amount of system RAM:
 - At least 128 MB of RAM for Windows XP (256 MB recommended)
 - At least 512 MB of RAM for Windows Vista (1 GB recommended)
- 125 MB of free disk space

Supported Databases

The following databases and versions have been tested for compatibility and are fully supported by Open Plan:

- Microsoft Access 2000 and later with the Microsoft Jet 3.51 or 4.0 OLE DB Provider
- ORACLE 9i, 10g, and 11g
- Microsoft SQL Server 2000, 2005, and 2008

Installation

Open Plan 3.3 Service Pack 2 is available as a self-extracting executable for Web download (both as a full install and a patch upgrade for Open Plan 3.3), and as a full CD installation. Customers may request a CD containing the full installation by calling Delttek support. While not absolutely necessary, it is good practice to back up all software and data before installing any software product.

For new installations, start the installation process and follow the instructions.

Upgrading From Previous Versions of Open Plan 3.3

Users upgrading to 3.3 Service Pack 2 from Open Plan 3.3 are recommended to use the patch upgrade method. This allows the upgrade of both standalone and network installations. Only the updated components of the installation are replaced and configuration files are not changed. Download and execute the update patch.

Upgrading From Open Plan 3.2

If you are upgrading from version 3.2 or below, you must perform a full installation Open Plan 3.3 Service Pack 2 to a new folder rather than attempting to overwrite/upgrade an existing Open Plan installation. Open Plan 3.3 Service Pack 2 supports concurrent installation with previous versions of Open Plan, provided that:

- The user has Power User rights.
- The two versions do not share the same database because earlier versions of Open Plan will attempt to update the registry with the current installation folder location when the older versions are invoked.

This is necessary to enable the OLE Automation server components of Open Plan.

It is necessary to perform a new Workstation installation for users that access Open Plan from a shared server installation. The Workstation setup application is available in the Workstation Setup folder of the server installation folder.

Upgrading the Open Plan Database

No database changes are required if you are upgrading from a previous version of Open Plan 3.3.

If you are upgrading from Open Plan 3.2 or earlier, you must upgrade the database to support new features. The system administrator can apply the appropriate upgrade script from the SQL folder.

The Open Plan 3.3 database is not backwards compatible with previous versions of Open Plan. For example, Open Plan 3.0, 3.1 and 3.2 cannot be used with an Open Plan 3.3 database and vice versa.



It is important that any briefcased projects are returned to the main database before performing an upgrade.

For Additional Information

In addition to the information and contacts contained in these Release Notes as well as the online help available in the product itself, the following sources of information are available.



Deltek support telephone numbers:

- US Domestic and Canada: 1.877.HLP.PROJ (1.877.457.7765)
- Europe (International): +0800.077.8960
- Australia (International): +61 (8) 8150 550

Deltek e-Support Knowledge Center

Deltek maintains a searchable knowledge base on the **Deltek e-Support** site. After logging on to the e-Support site at <https://support.deltek.com>, click the **Knowledge Center** tab. From this tab, you can search by **Product**, **Category**, and/or **Keyword**.



Please note that this is a protected site and requires a User ID and a Password. If you do not know your User ID, please contact your Support Contact Manager. If you forget your password, you can click the **Forgot Your Password?** link from the e-Support site to reset your password.



If this is your first time to use the e-Support site, Deltek recommends that you watch the tutorial videos available by clicking the **Tutorials** button at the top right of the screen.

Call Tracking System

Can't find what you are looking for? You can add a support ticket right from the e-Support site directly into our ticket tracking system. What's more, you can update or check the status of any open tickets.

To add a support call, complete the following steps:

1. Log on to the e-Support site (<https://support.deltek.com>).
2. From the e-Support site main menu, click the **Ask Support** tab.
3. From the **Product** drop-down list, select the product for which you have a question/problem. After you select a main product, select a sub-product from the drop-down list that appears.
4. From the **Severity Level** drop-down list, select the severity for your question/problem. To view the definitions for the severity levels, click the link to the right of the field.
5. From the **Issue Type** drop-down list, select whether the question/problem is **Technical** or **Application** in nature.
6. Using 60 characters or less, type a brief explanation of your question/problem in the **Subject** field.
7. Enter specific details about your question/problem in the **Question** field. The information you enter here assists Deltek support in resolving your case. For example, if this is a

- problem, enter your operating system and the steps you took prior to the problem occurring.
8. Attach any pertinent documents using the **Attach Documents to Case** section of the form.
 9. Click **Continue** and answers to related questions appear.
 10. Click a displayed answer to view the information. Do this if you think it pertains to your question/problem and may help.
 11. If your question/problem still exists, click **Finish Submitting Question**.

My Stuff/Case History

You can also review any open issues you may have or your past support calls online.

To view your support call history, complete the following steps:

1. From the e-Support site main menu, click the **My Stuff** tab.
2. Click **Case History** to view questions/problems you've submitted previously.



You can also update your user profile from the My Stuff tab. Clicking the **Account Profile** link displays a form that allows you to modify your preferences, user ID, and contact information.

Open Plan 3.3 Service Pack 2 Enhancements

This section includes summaries of the new enhancements included for this Open Plan 3.3 Service Pack 2 release.

Improved Performance for Loading Access-Controlled Lists

Open Plan 3.3 SP2 features improved performance when accessing collections controlled by Access-Controlled Lists, such as Projects, Calculated Fields, Sorts, Filters, and Views. This enables dialog boxes, such as the Insert Column and Manage Filters dialog boxes, to display faster when accessed for the first time.

Double-Click Anywhere on a Spreadsheet Row to Display the Details Dialog Box

In Open Plan 3.3 SP2, double-clicking anywhere on the spreadsheet activates the appropriate dialog box for editing data (most often the Activity Edit Dialog). In older versions of Open Plan, double-clicking a spreadsheet cell only activates the dialog box for editing data if that particular cell contained read-only information.

You can now edit text in a spreadsheet cell in Open Plan 3.3 SP2 with a single click to select a particular cell (for copy/paste function), and a second single click in the selected cell to edit the text.

New Options for Saving Placement Views

Open Plan 3.3 SP2 now supports a system option (Tools>>Options;>>Advanced) called `SAVE_PLACEMENTS_WITH_VIEW`, which allows users to choose whether network view activity placements are saved when a project is saved, or when the view is closed and changes are saved. The default setting is 0, which uses the Open Plan 3.3 method of saving activity placements regardless of how a network view is closed. If the option is set to 1, then the Open Plan 3.2 method is used wherein activity placement updates will only be saved if the user elects to save changes when the network view is closed.

Reduced Memory

Open Plan 3.3 SP2 now consumes less memory (RAM) when accessing databases with a significant number of normal (rotated) code and user-defined fields. This especially benefits clients with large numbers of code and user-defined fields running on a Citrix/Terminal Server environment.

Defects Resolved

This service pack contains a number of issues that have been resolved since the release of Open Plan 3.3 SP1. Note that the workarounds indicated for each defect were temporary solutions employed before the implementation of fixes in SP2.

102878

Description: The LOGICT view froze and displayed the message "Placements failed."

Impact: This defect affected all SP1 users.

Workaround: None.

Additional Notes/Comments: None.

103058

Description: Using a filter that contains an invalid expression in a calculated field caused Open Plan to fail.

Impact: This defect affected all SP1 users.

Workaround: Remove the invalid filter from the calculated field expression.

Additional Notes/Comments: Older versions of Open Plan allowed certain filter expressions that were not valid. Validation has now been improved.

103183

Description: A user with read-only access to project CLEAN (Group policy under Access Control) can still backup the project if the project is open. If the project is not open, this option is grayed out. In addition, a user with read-only access to this project can delete the project.

Impact: This defect affected all SP1 users.

Workaround: None.

Additional Notes/Comments: None.

104744

Description: In a project view where a section has multiple subsections, the pointer moved all the way to the bottom of the schedule when that section was expanded.

Impact: This defect affected all users.

Workaround: None.

Additional Notes/Comments: None.

143936

Description: Some activities were improperly flagged as Out of Sequence, resulting in inaccurate Time Analysis results.

Impact: This defect affected all users.

Workaround: None.

Additional Notes/Comments: None.

147284

Description: An error occurred when performing a CONTROL-D fill down in shared mode.

Impact: This defect affected all users.

Workaround: Turn off Automatic Time Analysis before performing a fill down.

Additional Notes/Comments: None.

147418

Description: The General Export scripts for XER file formats were not stripping linefeed characters from Resource Descriptions during export.

Impact: This defect affected all users.

Workaround: When creating the .xer file, manually remove any linefeeds within the (default) "Notes" field in the project's resource file before exporting to Primavera.

Additional Notes/Comments: None.

148864

Description: The Baseline Start Date and Baseline Finish Date fields in the Crosstable Export report did not display the BStartDate and BFinishDate of the identified baseline.

Impact: This defect affected all users.

Workaround: None.

Additional Notes/Comments: None.

150047

Description: Missing OPP_SUB records were causing subproject information not to be saved during Time Analysis and Resource Scheduling.

Impact: This defect affected users whose projects were missing the subproject table records for activities with an activity type of "Subproject."

Workaround: None.

Additional Notes/Comments: None.

151799

Description: Activity code field values may change to "ID UNAVAILABLE" for activities that were edited in the Codes tab of the Activity Details dialog box, or for activities that were created by performing copy/paste operations in a master project with external subprojects that have different code files assigned to the same code field.

Impact: This defect affected all users.

Workaround: Update the master project and all of its external subprojects to use the same code file for the appropriate code field.

Additional Notes/Comments: None.

7293

Description: A GPF error occurred while performing the Save As feature on a big multi-project that included the baseline and the user did not have, at the least, a read-only access to one of the ESPs.

Impact: This defect affected all users.

Workaround: Remove the ALL_OPP_PROJECT_USERS view.

Additional Notes/Comments: None.

7806

Description: The Title Block did not use the project's default date format.

Impact: This defect affected all users.

Workaround: None.

Additional Notes/Comments: None.

80617

Description: An error occurred while attempting to overwrite the security of a project/code file when creating a new project/code as a copy of an existing one.

Impact: This defect affected all users.

Workaround: None.

Additional Notes/Comments: None.

80669

Description: Unrotated user-defined duration fields did not accept negative durations.

Impact: This defect affected all users.

Workaround: None.

Additional Notes/Comments: None.

9039

Description: An overflow error occurred while running Schedule Comparison add-in.

Impact: This defect affected all users.

Workaround: None.

Additional Notes/Comments: None.

9041

Description: The File Open dialog box displayed behind Open Plan when importing files from MSP.

Impact: This defect affected all users.

Workaround: None.

Additional Notes/Comments: None.

9270

Description: The Project Template was not inserted as a child of a subproject that did not have any child activity.

Impact: This defect affected all users.

Workaround: None.

Additional Notes/Comments: None.

9271

Description: When printing a barchart with histogram, the report did not include the requested range and some pages contained duplicate information.

Impact: This defect affected all users.

Workaround: None.

Additional Notes/Comments: None.