Release Details

Please see below for further detail of functional changes and enhancements for Autum Release 2023.

(31)   Resource Demand - Change Tracking

Resource Demand grid now shows history of resource approval submissions and responses for a row, accessed by clicking on the speech bubble icon in the Changes column.

The Resource Approval board has the same facility.

(32)   Resource Demand - Move Feature

Resource Demand now has new Move feature, allowing resource demand to be moved in bulk (e.g. if project goes on hold and remaining demand has to be moved out) (see here).

(33)   Resource Demand - Grouping and Other UI Improvements

Resource Demand grid now allows Grouping (by dragging column names from the grid to the grouping area at the top). Columns can be dragged to change their sequence in the grid.

(34)   Resource Demand - Configurable Custom Columns

Resource Demand grid now reveals custom columns configured in database table Cost Transaction Header. This offers a facility for flexible augmentation of resource related data columns configured during implementation (not configurable by end users).

(35)   Resource Demand – Transfer Remaining Demand

New batch process to transfer demand from one resource to another (see here).

(36)   Resource Demand - Skills Management

All new features to:

- Maintain a master skills table (see here)
- Assign skills to Team Members (see here)
- Request skills as part of resource demand (see here)
- Consider skills request when assigning resource in resource approval board (see here)

(38)   Investment - Cost Transaction Mass Update

The Investment grid now allows multiple cost transactions to be updated at once (see here). This is useful in situations where forecast details recorded with multiple cost transactions all need to be moved, e.g. due to a delay of the project.

(39)   Investment - Hide Empty Rows

The Investment grid now has new button to Show/Hide Empty Rows (see here).

(137)   Resource Demand: Force Approval for specific Role

Resource Role table now shows new 'Approvals' tab (see here).

It shows new field 'Resource Approval Mandatory'. If set to Yes, then Resource Demand grid will protect the Team Member column, so that the user cannot select a Team Member. Instead they need to submit the row for approval, to request a team member assignment by the resource manager.

(138)   Resource Approval: Control who can approve resource requests

Resource Role table now shows new 'Approvals' tab (see here).

It now has new fields Approval Rule / Approver 1 / Approver 2. This feature allows approval requests to be directed to specific users/approvers as defined for the role.

The Resource Approval board now filters requests by role, to show only those where the current user is authorised to approve.

(210)   Lock historical cells

Resource Demand grid now allows historical months to be protected based on in (Settings/Resource Demand) system parameter 'Historical Lock (months)' (see here).

Investment grid now allows historical months to be protected based on in (Settings/Investment) system parameter 'Historical Lock (months)' (see here).

(211)   Resource Demand - Prevent Team Member change when there are actuals

Resource Demand row now protects Team Member field when actual effort is recorded in the Actual field.