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Summary

Here is what's new in **Version 2024.Q2**

User friendliness

We continued our way in improving the user-friendly functionalities of myPARM in the second quarter of 2024. With this release a couple of new features made their first appearance to myPARM and will continue to grow in functionalities during the upcoming months. Stay tuned and don't miss out on what's new!

New features

This release is holding lots of new features. You can now click on our logo in the upper left corner and will get to the Home view. This page is dedicated to give you a quick overview of most used pages in myPARM.

Did you ever ask yourself a question and couldn't find the answer right away? With the new Global Help in place, we offer you the answer straight away. Search for your answers in the manuals and videos or in our project management blog articles.

Within the Portfolio Management it is now possible to add new projects directly while you are working on your Portfolio. Of course, you will find them in our usual project portal in the corresponding project container.

Our biggest feature for this quarter is our new Cashflow and Resource planning. Having your costs at all time under control and know how many hours or days your employees can spent on projects. With one click you can easily adapt your budget, so we make sure you don't have to adjust manually in other places of myPARM.

This and other new features will support your project management effortlessly.

Quality enhancements

In case you are new to myPARM or simply forgot some of the many functionalities in myPARM, we enhanced the Welcome Tour and added the parts of invoicing and project control.

Our goal is to enrich the client's journey by tackling challenges, introducing innovative features, and optimizing their workflow, all to foster the success of their project.

1. New features

Home

Welcome home! By clicking on the myPARM logo on the upper left part of your screen you will see a new view.
Depending on your users settings, we offer five different sections in this view:

- Pending actions: Actions are applicable with due date, name of the action and reference to the project they are coming from. By clicking on an action, a new window is opening, leading to the selected action.
- Projects: Use the hyperlink to direct you to the project structure, if you select the line of the project, you will drill down to the PLA level. We give you the percentage of completion (POC) and indicate if there are issues with the project or PLAs (red/green lights).
- Graphics: Will show actuals vs budget, budget vs fee, invoiced vs fee and work in progress (WIP) where applicable. If you drill within the projects, these graphics adapt.
- Open process: Shows projects you have access to, which structure is currently being updated and further steps expected to take place.
- Waiting for approval: In case your company makes use of the approval process, and you are waiting for the next approval for your project, you will find more information right here, e.g. with whom is the current approval pending.
- Reports: Most common reports you have access to will be shown in the box down left.

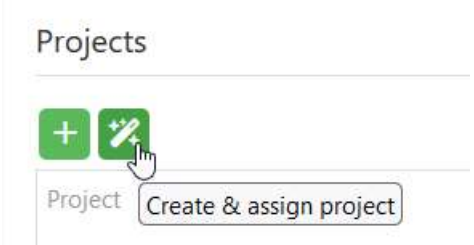
If you are wondering what happened to the old Home-view with the menu, we renamed the task management/Kanban board to Workspace.

Global Help

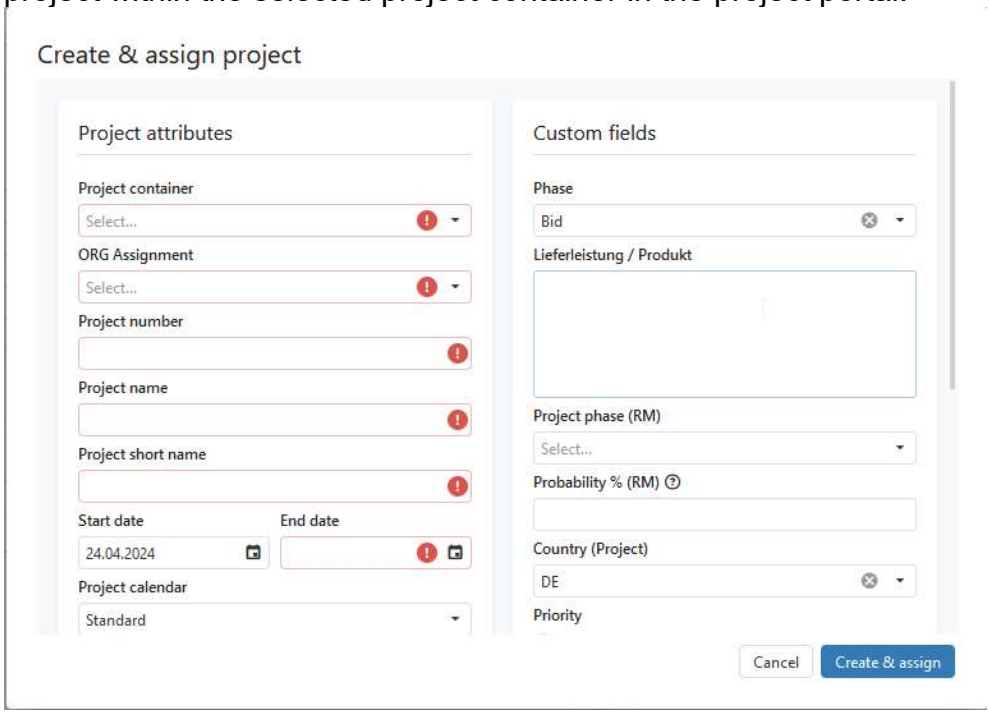
We newly created the Global Help which enables you to search for anything you are looking for within our manuals, training videos or even the blog posts from the Project Management ABC.
By simply typing in the word or topics you are looking for, myPARM is supporting full text search and delivers whatever you are looking for.

Portfolio Management

Create and assign projects directly from the Project Management Portal. In case you are planning on your portfolio, create corresponding projects on the fly by using the following icon:



Afterwards a pop-up window is opening, asking for the usual mandatory fields you know from our classic project portal. Of course, you will find your newly created project within the selected project container in the project portal.



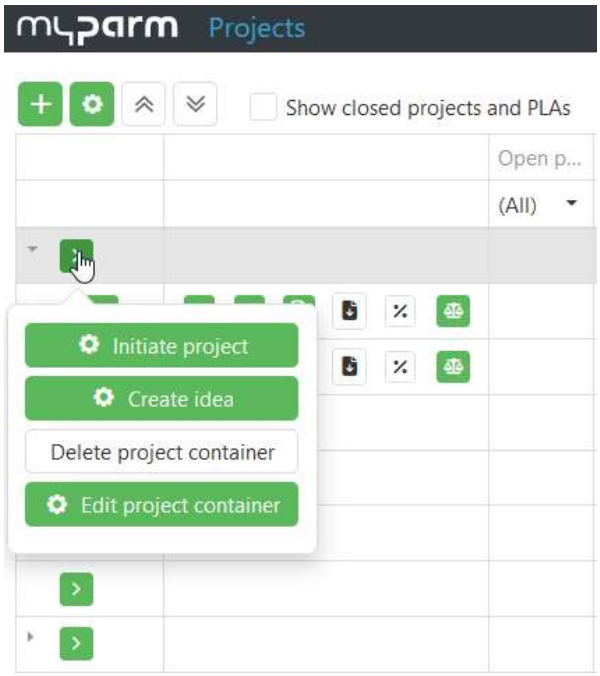
OpenAPI

The new feature leverages OpenAPI's standardized description formats, ensuring that API endpoints are consistently documented. This makes integration with other systems more straightforward and reduces the learning curve for new developers.

For more information about OpenAPI, please visit:
https://app.parm.com:901/OpenApi/Swagger/index.html

Idea Management Process

The idea management process is not added automatically, please talk to your Customer Success Manager or anyone from Parm to discuss if you wish to enable this further step in your project process.
Once the process is enabled, you can add your ideas before they will be a project:

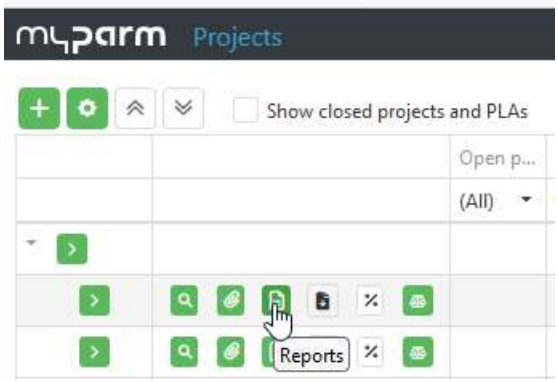


Multi-project Gantt context report

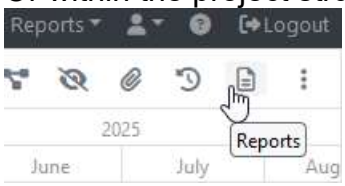
Based on where you are in the software, we added the possibility to extract reports directly in the following areas of myPARM:

- project portal,
- project structure,
- multi-project,
- project control and
- both budget processes.

For example within the project portal it looks like this:



Or within the project structure:



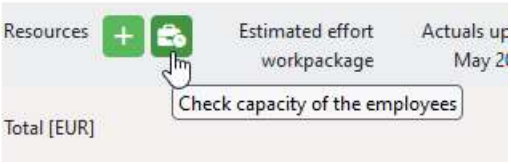
Besides this extract possibilities you can still retrieve your reports within the report menu section.

Copy logs into your template

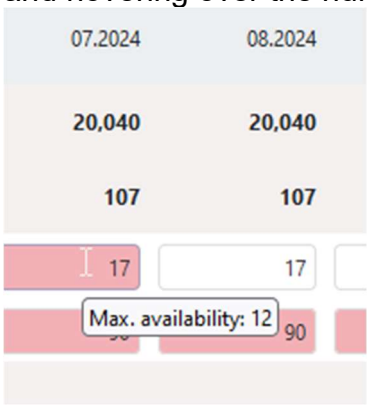
When creating a template you will now have the possibility to have your created logs within the template.
This means if you have standardized projects with reoccurring tasks, you are now able to save this within your templates.
This makes sure not task will be forgotten and people are notified already once you created your project.

Resource planning

Due to the importance of resource planning, we have redone our functionality and came up with something new.
Plan your resources either weekly or monthly and see directly if they are available:



The entered value will be highlighted in red if the employee's capacity is exceeded and hovering over the numbers show the actual available hours:

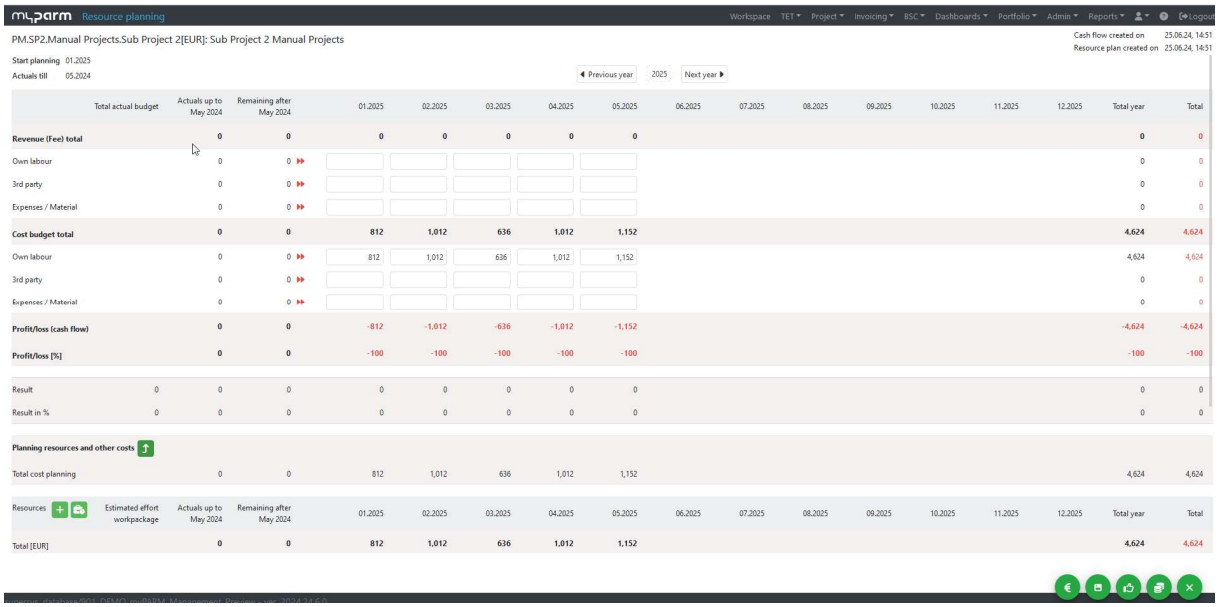


The adapted costs from resource planning can be then added into cash flow and budget planning with one click as well:



Cash flow planning

While redoing our resource management, we created the cash flow planning which can be used separately from the resource management if necessary.
You can do this based on company preferences weekly or monthly. Just let us know what you need when we initially set it up for you.



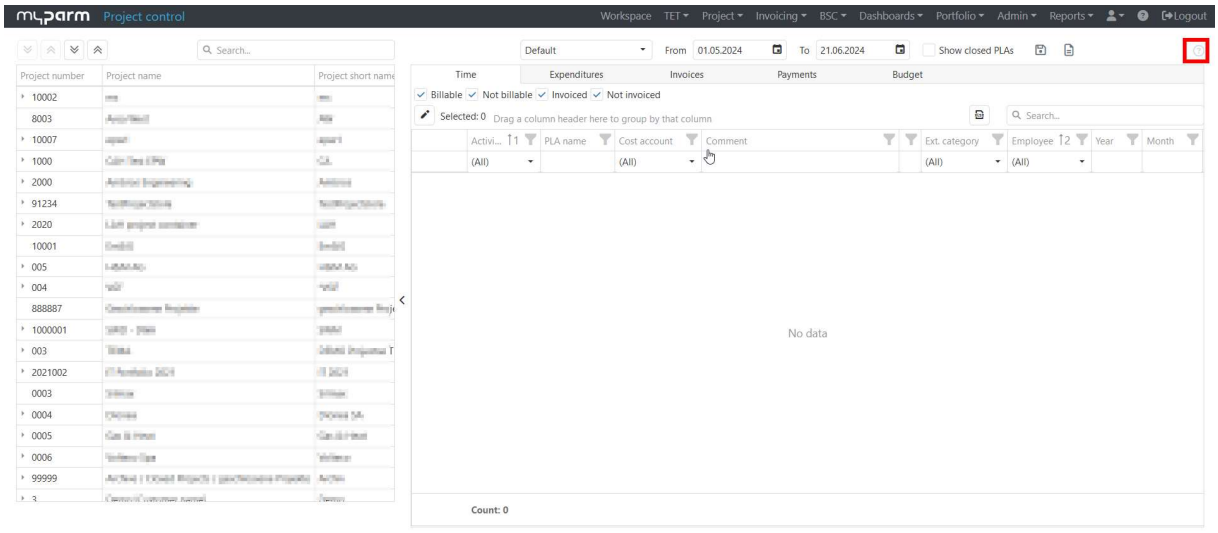
From here you can either enter the value in each box or just distribute linear on all boxes until the end of the PLA.
If you are interested in the look and feel, just reach out and book a quick demo.

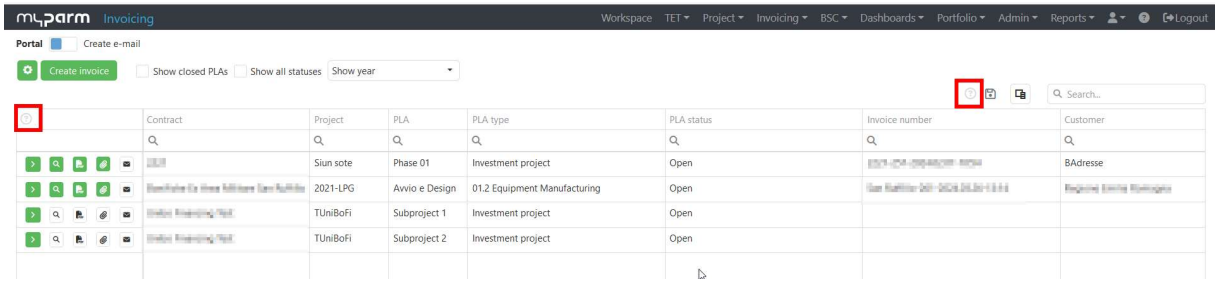
2. Quality enhancement

Welcome tour enhancements

After implementing the tours for the timesheet, we continued to add the tours for invoicing and project control.

Please note, the symbol will lead you through each symbol used within myPARM and can be selected in the header as well as within the main screen.





Dependencies

It is now also possible to create dependencies via an input mask in addition to the existing drag & drop function within the Gantt.

This new function can be used if the creation is “blocked” within the Gantt, or for dependencies that are not visible in the current screen window.
You can select this option within editing the project structure:



Select the level where the dependency should be created and use the new button in the menu. The new pop-up window shows the structure of the project. Grey parts of the structure can’t be selected as this prevents creating unlogic dependencies, e.g. circular reference.

Note:
If a dependency is inserted with this function, the date of the successor is not currently adjusted.
However, you can move the successor manually in the Gantt. The successor is then automatically moved each time a predecessor is moved.

3. Bugfixes

TET – PM Approval Collapse/Expand buttons

The usage of the expand all or collapse all projects in the PM approval of our TET module, was causing the website to not respond.
We were able to restore the functionality without any issues and projects can be collapsed and expand as before.

Welcome Tour – Finish button

For newly created users the finish button was only applicable without being able to switch to the next steps.
This is now fixed and new users are now able to experience the full welcome tour when entering the system.