# Release Notes 2025.Q1.1

March 2025

## Overview

This release introduces a new in-app notification system that keeps project teams and approvers automatically informed of workflow status changes via a bell icon and optional email delivery. It also completes the multilingual rollout of standard dashboards — now fully translated into six languages and available in all installation templates — and delivers the new Fee Budget Allocation dashboard showing planned and actual fee and cashflow data side by side.

## Feature Epics

### Process Notifications

A new notifications panel is now accessible via a bell icon in the main navigation bar. When clicked, it opens a dropdown listing the current user's notifications from newest to oldest, showing each notification's title, message text, and timestamp. Notifications older than 30 days are automatically removed. The panel can be closed by clicking anywhere outside it, and all notifications are deleted automatically if the associated user is removed from the system.

A red badge on the bell icon shows the count of notifications not yet seen in the dropdown. The badge is cleared as soon as the user opens the panel, and resets on each login to reflect any notifications received since the previous session. The badge count refreshes automatically every three minutes so users are kept up to date without manual intervention.

Notifications are generated whenever a custom process status changes on a project or idea. The message is formatted at the time of creation in the recipient's own language. Project leaders are notified when an approver changes the status; approvers are notified of actions taken by the project leader and by other approvers — but never of their own actions. Each user receives at most one notification per event regardless of how many roles they hold in the project.

Notifications that reference a project include a clickable link in the title. Clicking it marks the notification as read, closes the dropdown, and navigates directly to the project portal, where the relevant project is automatically selected in the grid. If the project is not currently loaded in the portal, it is fetched from the database on the fly. Closed projects are shown regardless of any active filters, making it easy to act on notifications for projects that would otherwise be hidden.

In addition to the in-app bell notification, an email is sent to each recipient whenever a workspace notification is created. Multiple notifications triggered in quick succession are grouped into a single email. Emails are sent to the business email address from HR and require SMTP to be configured on the instance; if SMTP is not set up, the email step is silently skipped without affecting the in-app notification. The notification panel also includes a Show only unread toggle, checked by default, so users see only outstanding items on opening. Individual notifications can be dismissed using the close button.

## Standard Dashboards – Multilingual Rollout

The standard dashboard suite is now fully translated and deployed across all installation templates. Four dashboards — Actions Performance Monitoring, Project Controlling, Resource Utilisation – Assignments, and Project Status — are available in English, German, French, Italian, Spanish, and Finnish. Dashboard names in the navigation menu are displayed in the logged-in user's language. All language variants are generated automatically during installation, and the underlying translation mechanism for reports and dashboards has been standardised to support consistent localisation going forward.

## Fee Budget Allocation Dashboard

A new Fee Budget Allocation dashboard is now available, providing a combined view of planned and actual fee revenue and budget costs across projects. For months up to the actuals threshold defined by the ResourceManagement.DefaultActualsTill setting, the dashboard shows real recorded values; for future months it shows planned figures. The boundary between actual and planned periods is visually distinguished within the dashboard. All projects are included in the view regardless of status or team assignment, including those without a cashflow plan. The dashboard is available in all supported languages and is automatically activated for Project Leader and Administrator roles.

# Standalone Improvements

### Portfolio Management – Draft Portfolio Tooltip

The Draft checkbox in the portfolio management view now has a help tooltip explaining that draft portfolios cannot be selected in idea or project attributes. This removes ambiguity for administrators managing portfolio visibility and availability.

*For questions regarding this release, please contact your account representative.*

# Release Notes 2025.Q1.2

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## Overview

This release completes the Polish language localisation for the remaining areas of myPARM — including standard dashboards, the home dashboard, the risk register, and predefined MIS warehouses. It also introduces support for multi-PLA fixed-amount invoices and delivers a visual improvement to the mobile timesheet for read-only entries.

## Feature Epics

### Polish (PL) Localisation – Final Completion

This release finalises full Polish language support across myPARM. Standard dashboards are now available in Polish, with all labels, filters, and chart elements translated and verified for consistency with the rest of the application. The home dashboard has also been translated to Polish and is generated automatically during installation.

The risk register has been updated with Polish translations throughout, covering all statuses, field labels, and interface text. In addition, the predefined MIS warehouses — including Employee Warehouse, PLA Warehouse, Project Status, Resource Management Employees, and Actions — are now fully translated into Polish, completing localisation coverage across reporting and data warehouse views.

### Invoicing – Multi-PLA Fixed-Amount Invoices

It is now possible to create fixed-amount invoices that span multiple PLAs. When several PLAs are selected during ad-hoc invoice creation, the fixed-amount option is now enabled. Rather than entering a single total at the creation step, the amounts are specified per activity in a dedicated grid on the Fix tab of the invoice draft. Each row in the grid corresponds to an activity selected in the previous step and shows the activity name, a comment field, and an editable total invoice amount. An indicator flags any row where the amount has been manually changed.

Multi-PLA fix invoices support the full invoicing lifecycle: they can be moved to final status, reversed, and deleted in the same way as standard invoices. The read-only view has been updated to display the per-activity grid for these invoice types. For single-PLA fixed invoices, behaviour is unchanged, with the minor improvement that the now-redundant invoicing point date and "to be created" fields have been removed from the fix tab.

## Standalone Improvements

## Mobile Timesheet – Read-Only Entry Styling

Timesheet entries that cannot be edited are now displayed with a greyed-out appearance in the mobile view, consistent with the visual treatment already used for expenditure entries. This makes it immediately clear to users which entries are locked, reducing confusion when reviewing approved or closed periods.

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# Release Notes 2025.Q1.3

March 2025

## Overview

This release introduces a comprehensive set of guided custom project processes — from creation through to attribute and structure editing. Each process includes approval workflows, custom process statuses, and integrated notifications. The release also delivers the new Project Status standard dashboard, automatic period generation, and a set of usability refinements across the project portal and navigation bar.

## Feature Epics

### Custom Project Process Adjustments

A new predefined project type — StM Projekt — has been introduced. This type is system-managed: it cannot be renamed, deactivated, or deleted by users, ensuring consistent identification of StM projects across the application. Together with the existing Project Idea kind, this allows myPARM to distinguish unambiguously between ideas, StM projects, and all other project types.

Two new creation workflows have been added for converting approved ideas into formal projects. The Create StM Project Order process transforms a project idea into a StM, automatically setting the project type to StM Project and locking it as read-only for subsequent steps. The Create Other Project process similarly promotes an idea into an unrestricted other project, allowing the user to freely select the appropriate project type during the process. Both workflows follow the same three-step structure — Attributes, Structure, Approval — and are non-repeatable once completed, directing further changes to dedicated editing workflows.

Four dedicated editing workflows are now available for managing existing StM and Other projects post-approval: Edit StM Project Order Attributes, Edit Other Project Attributes, Edit StM Project Order Structure, and Edit Other Project Structure. Each workflow includes an Attributes or Structure step followed by an Approval step, with preconditions that ensure only the appropriate project type can enter each process. When an approver declines with a rejection, the project returns to its last approved status and a notification is sent to inform the project leader that recent changes have been rejected.

All new and updated project processes support custom process statuses when enabled, covering the full range of states: Draft, Pending Approval, Approved, Correction Needed, Postponed, and Rejected. Workspace and email notifications are generated at key transitions, keeping all stakeholders informed. Additionally, the Active flag in the Edit StM and Edit Other attribute processes is now handled correctly: these processes can be run even when a project is inactive, enabling project leaders and approvers to reactivate a project through the approval flow without being blocked.

The project type field's editability has been standardised across all workflows: it is editable during initiation and structure editing where appropriate, read-only during approval steps, and locked for system-assigned types such as StM Projekt and Project Idea. Process action buttons have also been renamed for clarity — Save & Next replaces the ambiguous Save label on the advance button, and the Close, Delete, and Rate actions now refer to ideas and projects collectively.

### Standard Dashboards

The Project Status dashboard is now delivered as a standard dashboard and activated automatically across all installations. It is available in all supported languages and displays all key project KPIs in the system currency. The dashboard is pre-assigned to roles with the Project Portal access right, so it becomes visible to the relevant users without any additional configuration. Project types associated with Absences and Administration have been excluded from the dashboard's data scope to keep the view focused on relevant project activity.

## Standalone Improvements

### Automatic Period Generation

Monthly periods are now generated automatically for all installations up to December 2039, eliminating the need for manual period creation. Period names are localised according to the application language with the month name capitalised. The period administration grid now defaults to showing only current and past periods, placing the current period at the top for easy access when closing periods.

### Admin Dashboard – Automatic Role Assignment

The administration standard dashboard is now activated automatically and pre-assigned to roles with the supersystem administrator security level for each installation. If the role is already assigned, the setup is skipped without raising an error, making the process safe to run on existing instances.

# Release Notes 2025.Q1.4

April 2025

## Overview

This release delivers a comprehensive set of improvements to project and idea workflows, including a new Project Class concept that enables configurable process routing, custom process statuses, and automatic portfolio assignment. Notification support is extended to cover the initiation process, and the project portal gains a resource planning status indicator. Additional improvements cover resource management hour precision, dashboard access controls, HR data management, and a redesigned error popup.

## Feature Epics

### Project Process Adjustments

A new Project Class attribute has been introduced, allowing organisations to categorise projects and ideas into configurable classes. The field can be made visible, editable, and required via system settings (`Project.Attributes.EnableProjectClassField` and `Project.Attributes.IsProjectClassRequired`). It appears in the Attributes step of the initiation and editing processes and is available in all supported languages.

The initiation process now supports custom process statuses, giving teams a structured way to track where a project or idea stands within the approval workflow. When a workflow step transitions, a corresponding workspace notification is generated for relevant users. Portfolio assignment during the initiation process is also now automatic: when a project class is selected, the system assigns the associated portfolio before approval, so the approver always sees the correct value.

The workflow approval step now shows a decline details button whenever the approval was previously declined and is being resubmitted after correction. This makes it immediately clear to the approver that a correction has been made and allows them to review the original decline reason. A new setting (`Project.OpenPlasAfterApproval`) controls whether planning assignments are opened automatically once a project is approved, defaulting to enabled so that resource planning can begin without additional manual steps.

The process status filter in the project portal has been replaced with a dropdown selector, enabling reliable filtering by both standard statuses and custom process statuses. Several additional portal filter inconsistencies have also been corrected.

### Process Notifications

Workspace notifications are now generated for the initiation process when custom workflow statuses are active. Users involved in project management and approval roles receive notifications at key transition points, keeping all stakeholders informed without requiring manual follow-up. Approval notifications were verified to work correctly for users who have visibility across all projects but are not direct members of the project team.

### Resource Planning Status in Project Portal

The project portal now displays a custom status indicator — Draft Resource Planning — whenever a resource planning process is actively in progress for a project. The status is set automatically when the process is started and removed as soon as it is closed, whether completed or cancelled. This gives project leaders and portfolio managers immediate visibility into which projects currently have an open resource planning draft, without needing to navigate into each project.

### Standard Dashboards

Dashboard visibility in the Dashboard Access view is now controlled by the security level of the logged-in user. Dashboards assigned to roles with a lower security level than the user's own are no longer accessible to that user, ensuring that administrative and configuration dashboards are only visible to appropriately privileged accounts.

The period filter on the Project Budget Proposal dashboard has been updated to use months instead of quarters. The previous quarterly filter had a known limitation where selecting a single month within a quarter would show no data unless the full quarter was selected. Monthly filtering resolves this and allows more precise period selection.

### Resource Management – Two-Decimal Hour Precision

The setting controlling decimal precision for planned hours in resource management has been updated and renamed to `ResourceManagement.AllowTwoDecimalsForHours`. When enabled, users can enter planned hours with up to two decimal places, accommodating fractional hour values below one hour without conversion issues. When disabled, only integer hour values are accepted, preserving the previous behaviour.

## Standalone Improvements

#### HR – Employee Deletion Unblocked for Unused Data

Employees who have only pre-configuration data in the system (such as default settings, favourites, skill entries, or completed tour records) can now be deleted without error. Previously, the presence of this ancillary data would prevent deletion even though the employee had never actively used the application. Cascading deletions have been added for the relevant tables so that removing an employee also cleans up these associated records.

#### Custom Form – Wider Numeric Fields

Numeric input fields in custom forms have been widened to accommodate large values, including negative amounts up to nine digits with two decimal places. The horizontal scroll bar is now positioned above the action buttons, ensuring the buttons remain accessible when the form content overflows horizontally.

### Employee Synchronizer – Configurable Department Transformations

A new setting (`Synchronizer.Employee.DepartmentTransformations`) allows administrators to define custom mapping rules that transform incoming department values from an employee data import into the corresponding organisation unit names used in myPARM. This replaces previously hard-coded transformation logic, making the synchronizer reusable across different customer environments.

*For questions regarding this release, please contact your account representative.*

# Release Notes 2025.Q1.5

April 2025

## Overview

This release expands myPARM's standard dashboard catalogue with three new out-of-the-box dashboards covering resource utilisation, project controlling, and budget-versus-actuals comparison. It also delivers usability refinements to the project portal, introduces a dedicated workflow for promoting ideas to projects, and includes performance and stability improvements to the dashboard infrastructure.

## Feature Epics

### Standard Dashboards

Three new standard dashboards are now available out of the box, automatically installed in all supported languages and configurable through the Dashboard Access administration view.

The Resources Utilisation – Assignments dashboard gives resource managers a consolidated view of employee capacity and project assignments. Dashboard parameters are now reactive, so changing filters immediately refreshes capacity data. The Employee Capacity row in the pivot table is translated into all supported languages and displayed prominently at the top of the employee/project tab.

The Project Controlling dashboard provides a financial overview of all projects in system currency, regardless of individual PLA currencies. All active and inactive projects are included, and the dashboard is available in all supported languages. It is enabled by default on standard deployments and can be assigned roles on other configurations.

The Project Budget Proposal with Actuals dashboard extends the existing budget proposal view by adding a direct comparison between planned values and timesheet actuals. A new Summary tab shows planned versus actual hours and costs side by side, with absolute variation and a percentage-of-target indicator using colour-coded thresholds (green below 80%, amber between 80% and 100%, red above 100%). A second tab presents planned versus actual values charted month by month, including an absolute variation per month chart. The default period filter is set to the current quarter, and the project/container filter lists are now independent of the selected period, with the project and PLA list dynamically scoped to the selected container. The dashboard is available in all supported languages.

### Project Portal – Process & Navigation Improvements

After completing a workflow action such as closing or approving an idea or project, the project portal now returns the user to their previous position in the container tree, with the relevant project still selected and the container expanded. Previously, users were returned to the top level with all containers collapsed and nothing selected.

Custom status filtering in the project portal has been corrected. When combining status filters and then removing individual values, the filter now correctly narrows to the remaining selection rather than reverting to showing all statuses. Filtering by blanks alone or in combination with other statuses now behaves consistently.

### Promote Idea to Project Workflow

A new workflow — Promote Idea to Project — is now available, allowing users to formally transition a project idea into a full project through a structured approval process. The workflow follows the same steps as the standard project initiation process (Attributes, Structure, Approval) and is available in all seven supported languages.

The workflow can only be started for entries with the Project Idea project class. Upon successful completion and approval, the project class and type are cleared and the entry becomes a standard project; if the process is rejected, the idea remains unchanged. Once completed, the workflow cannot be re-executed on the same entry.

## Standalone Improvements

### Dashboard Server Performance

An issue causing the Dashboard API application pool to consume excessive CPU — in some cases reaching 100% utilisation and degrading the performance of other hosted applications — has been investigated and resolved.

### Microsoft Entra Integration – Documentation

Documentation covering the configuration and use of the Microsoft Entra (formerly Azure AD) integration has been completed and made available for administrators setting up SSO and employee import.

*For questions regarding this release, please contact your account representative.*