Release Notes 2025.Q2.1

May 2025

Overview

This release centres on Resource Management Snapshots — a new capability that allows authorised users to capture point-in-time versions of resource plans directly from the project portal. Two snapshot types are introduced: ordinary snapshots for routine archiving and approved snapshots for formally signed-off plan versions. Alongside this, the release delivers improvements to payment entry in the invoicing module, a new Actions Performance Monitoring dashboard, editable project Active flag handling in project workflows, and a number of targeted usability and data integrity improvements.

Feature Epics

Resource Management Snapshots

Users with the new CanCreateRMSnapshots access right can now create historical snapshots of resource plans directly from the project portal. Two dedicated buttons are available in the portal: one to create an ordinary snapshot and one to create an approved snapshot. Snapshot creation runs asynchronously in the background, preventing concurrent runs and providing progress feedback to all users currently viewing the portal.

An ordinary snapshot captures the complete resource plan and cashflow data for all active planning assignments in the database at the moment of creation. The snapshot start planning date is calculated automatically based on the system's default actuals-till setting and granularity (monthly or weekly), and is stored with a header recording both the creation date and the start planning date. If a snapshot already exists for that date it is overwritten, ensuring only one snapshot per date is retained.

An approved snapshot follows the same logic but requires the user to select a specific start planning date before creation, making it suitable for formally marking a plan version as approved. The Project Budget Proposal and Project Budget Proposal with Actuals dashboards now include a 'Resource plan valid on' parameter, allowing users to compare current actuals against any previously approved snapshot. Similarly, the Fee Budget Allocation dashboard includes a 'Cashflows valid on' parameter to view ordinary snapshot data alongside current figures.

Data integrity has been addressed for both employees and projects. When an employee is removed from the system, their name and short identifier are preserved in a separate table so that snapshot data referencing them continues to display correctly. When a project or planning assignment is deleted, any associated snapshot data is also removed cleanly, and projects that previously could not be deleted due to cashflow or resource plan data can now be removed without errors.

Project Active Flag in Workflows

The project Active flag can now be edited within the relevant project workflows, including Initiate Project, Edit Project Attributes, Create Idea and Edit Idea. Previously, users who set a project to inactive during creation found the flag locked after approval, preventing subsequent changes. It is now also possible to start or continue these workflows when a project is in an inactive state, giving project managers full control over the active status throughout the project lifecycle.

Invoicing – Payment Entry Improvements

The payment entry popup in the invoicing module has been redesigned to make adding payments in foreign currencies faster and more intuitive. When the popup opens, the payment date defaults to today and the currency defaults to the system currency. If the user switches to a foreign currency, two additional fields appear — the payment amount in system currency and the exchange rate — with the exchange rate automatically populated from the configured currency rate tables based on the selected date. All three numeric values (foreign currency amount, system currency amount, and exchange rate) are kept in sync: changing any two automatically calculates the third, reducing manual entry and the risk of mismatched values. The payment due date column in the payments grid now uses the same date format as the rest of the application.

Standard Dashboards

A new Actions – Performance Monitoring dashboard is now available, providing an overview of action status, priorities, costs, and timelines across the organisation. The dashboard shows data from the last two years through to the current date, based on due date where available or last update date otherwise. It is available in all seven supported languages and can be activated and assigned roles via the dashboard access administration view. The detail tab includes start date, tags, priority, and cost columns, replacing the previously shown record ID and module columns.

In the dashboard access administration view, Super Administrators can now see the internal filename of each dashboard directly below the active flag, making it easier to identify and manage dashboards. Dashboard translations are also now preserved correctly when the active flag is toggled — previously, saving an active flag change would remove the translated name.

Standalone Improvements

Currency Exchange Rate Uniqueness Constraint

A database uniqueness constraint has been added on currency exchange rates, preventing duplicate entries for the same currency, date, and exchange rate type combination. Conflict handling ensures the view refreshes gracefully if a concurrent save produces a conflict.

Resource Management – Employee Selector Performance

The employee selector in the Resource Management area has been optimised for environments with large employee populations. Previously, opening the employee combo box in contexts such as the add-exception popup could cause the application to become unresponsive when more than a thousand employees were present.

Release Notes 2025.Q2.2

May 2025

Overview

This release introduces the Event Rule Engine — a scheduled automation framework that enables time-based notification rules to run across all myPARM instances. Built on top of this infrastructure, the first rule delivered ensures that approvers are automatically notified when a process on hold reaches its approval due date. Alongside this, the release delivers improvements to the Risks on Workspace area, expanded two-decimal precision in resource management dashboards, a new CSV-based project import capability, editable project class support in creation processes, and a series of targeted performance improvements for large employee and organisation unit data sets.

Feature Epics

Event Rule Engine & Approval Due Notifications

A new Event Rule Engine has been introduced to power scheduled, automated actions across myPARM. The engine runs periodically via a SQL Server Agent job and evaluates all active event rules in sequence, logging each execution and handling errors gracefully so that a failure in one instance does not affect others. Rule definitions are stored in a dedicated automation database schema (atm), and a separate maintenance job purges execution logs older than 90 days.

The first rule delivered on this platform is the Approval Due Notification. When an approver declines a project process using the 'put on hold' option, they are now required to specify a future date by which the review should resume. This date is visible as a tooltip in the project portal, showing the hold-until date alongside any decline comment. Once that date arrives, the rule engine automatically raises a bell notification to inform the relevant PMO that the hold period has elapsed and the project is ready for a decision. Existing processes that were already on hold at the time of this release have been assigned a hold-until date of seven days from the deployment date.

The notification bell indicator has also been improved: clicking the unread count badge now correctly opens the notification panel, resolving a usability issue where the badge overlapped the bell icon and made it difficult to click.

Risks on Workspace – Kanban Card Enhancements

Risk and quality action cards displayed in the workspace Kanban view have been updated to show the action's responsible persons rather than the author. Where multiple responsibles are assigned, they are listed alphabetically separated by a bullet separator. The Kanban board search has been updated accordingly to filter by responsible rather than author. These changes apply across all card types and all Kanban-capable views — workspace, project, MIS, BSC, and dashboards.

In addition, each risk action card in the workspace now includes a bolt icon that, when clicked, opens a read-only view of the parent risk. This allows the person assigned to an action to understand the risk context even if they would not otherwise have direct access to the risk record. The due date of the action, if set, is displayed on the card alongside the icon.

Resource Management – Two-Decimal Precision in Hour Fields

Hour values in the standard Resource Management dashboard now display with two decimal places across the Employees/Projects and Portfolio/Projects/Employees tabs, covering both capacity and planned hour fields. The same improvement has been applied to the resource weekly dashboard, where the Employees and Projects views now show two decimal places for capacity, planned, and task-planned hours. This change improves accuracy for organisations that plan resources in fractional hour increments.

Performance Improvements – Large Employee and Organisation Data

Significant performance improvements have been made for environments with large employee populations and complex organisation unit hierarchies. Saving a new employee record, which previously took around 15 seconds, and updating an existing employee, which could take up to 8 seconds even for minor changes, have both been substantially optimised. The employee import process has also been reworked to reduce processing time for large imports — previously importing 11,000 employees could take close to four hours.

Project Import from CSV

A new project import capability has been introduced, allowing projects to be created in bulk by uploading a CSV file via the Admin / Import / Projects menu. The import supports all core project attributes — including project number, name, class, type, phase, portfolio, organisation unit, leader, dates, budget, and country — as well as a set of custom fields for deployments that require them. Validation is applied per row: successfully validated projects are created immediately, while any rows with errors are marked with a descriptive message so they can be corrected and re-imported. All business errors for a given row are concatenated into a single error field, making it straightforward to identify and resolve multiple issues at once.

Standalone Improvements

Budget Proposal Dashboards – Full Localisation

The Project Budget Proposal, Project Budget Proposal with Actuals, and Fee Budget Allocation dashboards have been translated into all remaining supported languages making them fully available to all users regardless of language setting.

Project Controlling Dashboard – Chart Refinements

The invoiced data point marker in the Project Controlling standard dashboard now appears only in the lower cost pane, removing visual clutter from the upper chart. The 'last warehouse update' timestamp is now shown with the exact time of day rather than date only, giving users a more precise indication of data freshness.

Release Notes 2025.Q2.3

June 2025

Overview

This release delivers a major new capability: a dedicated Resource Management Portal that gives project leaders a streamlined, centralised view for managing resource plans across all their PLAs. Alongside this, the release brings improvements to how organisation unit information is displayed in the Resource Management module, a new project class for the Linie portfolio, an invoice period calculation refinement, extended organisation unit name formatting, and an enhanced Automation administration view for managing notification rules.

Feature Epics

Resource Management Portal

A new Resource Management Portal has been introduced, giving project leaders a single, efficient interface for carrying out resource planning across all their PLAs. The portal is accessible from the Projects menu and displays all PLAs relevant to the logged-in user — including those where they hold the role of project leader or PLA leader — along with each PLA's current status.

Users can filter the PLA list using a combination of full-text search, project, PLA leader, and PLA status filters, making it easy to focus on specific workstreams. Once inside a resource plan, navigation arrows allow moving directly to the next or previous PLA without returning to the portal list, and the process state is automatically saved or finished on transition. A dedicated budget creation button is also available for users working without automated flow, enabling a quick save-and-budget action in one step. The portal is available in all supported languages and access is controlled via a dedicated permission right.

Resource Management – Organisation Unit Information Display

When the application setting ResourceManagement.ShowOrganisationUnitInformation is enabled, the employee list in the resource planning view now displays the employee's cost centre (CC) organisation unit name alongside their name. This allows resource planners to visually group and sort employees by their organisational unit at a glance. A tooltip on each employee entry shows the full hierarchy — the parent organisation unit name followed by the CC name — providing additional context without cluttering the view. The tooltip format has also been refined in this release to display the employee's CC organisation unit name followed by the formatted employee name, improving clarity when the setting is active.

Automation Administration – Event Rules Management

A new Automation administration view has been added under Admin / Configuration, providing a central place for administrators to manage notification and automation rules. The view lists all configured event rules with their name, description, and active status, and allows administrators to toggle each rule on or off with immediate effect — no save button required. The first rule available in this view is the Approval due notification, which controls whether approvers are notified when a process on hold has reached its approval due date. Access to this view requires the Administrator access right. This lays the groundwork for the broader notification rule management capability delivered in subsequent releases.

Invoicing – Invoice Period From Date Calculation

The logic for automatically recalculating the invoice period from date has been refined to preserve manually set or historically lower dates. Previously, any change to the included invoice entries — such as excluding a time entry or deleting an extra — would reset the period from date to the earliest remaining entry date, potentially overwriting a date that had been intentionally set earlier. The updated behaviour ensures the period from date is only changed if the newly calculated date is earlier than the one currently set, protecting deliberate date choices and preventing unintended date advancement when entries are removed.

Organisation Unit Name Formatting – Short Name Support

The General.OrganisationUnitNameFormat application setting now supports a {Short} placeholder in addition to the existing {Number} and {Name} options, giving administrators more flexibility in how organisation units are displayed throughout the application. A new companion setting, General.OrganisationCostObjectNameFormat, has also been introduced for controlling the display format of organisation cost objects, defaulting to {Number} - {Name}. These changes allow organisations with established short-code naming conventions to reflect those codes consistently in all relevant views.

Standalone Improvements

Organisation Unit Select Box Performance

Organisation unit and employee selection dropdowns that previously caused the interface to freeze when loading large data sets have been improved through the introduction of paging. This resolves a noticeable delay experienced in HR and other views when organisations with a large number of units attempted to load all entries at once into a single select box.

Dashboard TextBox Widget Support

Dashboard designers can now use a TextBox widget in myPARM dashboards, enabling text-based content — including titles, descriptions, and conditionally formatted labels — to be embedded directly within dashboard layouts. This extends the range of dashboard elements available when building custom views and reporting layouts.

Release Notes
2025.Q2.4

June 2025

Overview

This release focuses on two major themes: automated notifications in the Resource Management module and expanded language support. Employees and organisation leaders are now automatically notified whenever their resource plans change, with full administrator control over notification rules. Alongside this, myPARM gains Swedish as a new supported language. The release also includes a new GDPR-compliant user activity dashboard, and a set of default score maps to streamline portfolio evaluation setup.

Feature Epics

Resource Management – Employee Resource Plan Change Notifications

myPARM now automatically notifies employees whenever their resource plan is created, modified, or removed. When a resource planning process is completed and the assigned hours for an employee have changed, that employee receives an in-app notification via the bell icon, indicating which PLA was affected and whether they were added, removed, or had their plan updated. Notifications are sent in each user's own language and are available across all supported languages. This keeps team members informed of changes to their workload without requiring manual communication from resource managers.

Automation Administration – Configurable Notification Rules

The existing Admin / Configuration / Automation view has been extended to include notification rules alongside workflow event rules. Administrators can now activate or deactivate individual notification settings directly from this consolidated view, without requiring system-level changes. The first rule available is the employee resource plan change notification, which controls whether employees receive alerts when their resource plan is updated. Additional rules for organisation unit leaders are also managed here. This gives administrators clear, centralised control over what automated communications are sent and to whom.

Resource Management – Organisation Leader Notifications

Organisation unit leaders are now notified when the resource plan for employees within their organisational unit changes. When a resource planning process concludes, each leader responsible for an affected unit receives a separate in-app notification listing the employees who were added, removed, or modified within that unit. Notifications correctly reflect the leader's own preferred language, and the feature handles scenarios where multiple leaders manage the same unit — each receiving their own distinct notification. The notification rule can be independently toggled on or off via the Automation administration view.

Full Swedish (SV) Localisation

myPARM is now available in Swedish (Svenska), extending the platform's reach to Swedish-speaking users and organisations. The complete application interface has been translated into Swedish, covering all standard UI elements and labels. The Swedish language is activated automatically for the dedicated SaaS instance, and is also available for on-premise deployments. Note that this initial release focuses on the core application; reports, dashboards, tours, and MIS warehouses are not yet included in the Swedish translation.

Standalone Improvements

User Activity Dashboard

A new standard dashboard — User Activity — gives administrators a GDPR-compliant overview of when employees last used myPARM. The dashboard categorises users by time since their last login: within 30 days, 31–60 days, 61–90 days, or more than 90 days ago. Results can be filtered by clicking a category card, and the grid displays each user's login name, formatted employee name, and activity ageing. The dashboard is enabled by default for administrator roles in the standard deployment. The previously existing dashboard with a similar name has been renamed to Login Activity Monitor to avoid confusion.

Default Score Maps for Portfolio Evaluation

New SaaS instances are now pre-populated with a default score map named Projects/Initiatives (translated into all supported languages), providing a ready-to-use starting point for portfolio scoring and evaluation. The score map includes five evaluation criteria — Costs, Duration, Risk, Urgency, and Importance — each with five predefined rating levels, all correctly translated per language. Any existing placeholder score map containing only a single empty criterion is automatically replaced, ensuring a clean and consistent setup for new customers.

Role Setting Label Improvement

The 'Receive Notifications' field in the Roles configuration view has been renamed to Enable for employee bulk assignment to better reflect its actual purpose. This setting controls which roles appear in the Observer role selector for bulk employee assignment in logs, and had no connection to the notification system despite its previous name. An explanatory tooltip has also been added to make the field's function immediately clear to administrators.

Release Notes 2025.Q2.5

July 2025

Overview

This release introduces a comprehensive set of enhancements to myPARM, covering security and password policy management, full Dutch and Swedish localisation, improved portfolio and resource management capabilities, extended OpenAPI and Microsoft Entra integration support, and several customer-specific improvements. Together, these changes strengthen both the platform's configurability and its reach across new markets.

Feature Epics

Password Requirements & Security Policies

myPARM now supports configurable password policies that administrators can define and enforce across the application. Password rules — including minimum length, restrictions on the use of personal information, and requirements for uppercase letters, numbers, and special characters — can be set centrally via application settings and are enforced wherever users create or change passwords, including in the HR module and the standard user management interface. These policies apply both to self-service password changes and to administrator-managed accounts, giving organisations greater control over their security posture and enabling compliance with internal IT governance requirements.

Full Dutch (NL) Localisation

The entire myPARM application is now available in Dutch (Nederlands), completing a full end-to-end translation of the user interface, report viewer, guided tours, standard dashboards, and MIS warehouse labels. A dedicated Dutch SaaS instance has been added to the multi-instance infrastructure, enabling Dutch-language customers to access the platform in their native language from day one. This release lays the operational foundation for serving the Dutch market with a fully localised experience across all major modules.

Swedish (SV) Localisation Infrastructure

A new Swedish-language SaaS instance has been provisioned within the myPARM multi-instance platform, establishing the technical infrastructure needed to serve Swedish-speaking customers. This step is part of the ongoing expansion of myPARM's language support across Scandinavian and European markets.

Default Form Values – Currency & Project Type

Administrators can now configure default values that are pre-selected in key form fields throughout the application. The system currency is automatically pre-selected in all currency fields unless a more specific rule applies, eliminating repetitive manual input for organisations operating in a single currency. Similarly, a default project type can be defined so that new projects and PLAs are pre-populated with the most commonly used type, saving time during project setup. Both improvements reduce data entry effort and help ensure consistent use of standard values across the organisation.

Process Status in Project Portal

The project portal has been enhanced to support a broader set of process statuses, providing more granular visibility into where a project stands within its lifecycle. Standard project portal statuses have been extended so that project teams and stakeholders can track progress more precisely without needing to rely on custom status configurations. This improvement applies to all customers using the standard status set.

OpenAPI Authentication Administration

A new administration view has been added under Configuration to manage OpenAPI authentication settings. Administrators can now configure and oversee API access credentials directly within the myPARM interface, making it easier to set up and maintain integrations with external systems via the OpenAPI endpoints. This complements the existing OpenAPI infrastructure and supports organisations building automated workflows or third-party connections to myPARM.

JWT Authentication – WebAPI CI Configuration

As part of the ongoing transition to JWT-based authentication, the continuous integration and deployment pipeline for the WebAPI has been configured and validated. This internal infrastructure improvement ensures that automated testing and deployment processes are in place to support the stable rollout of JWT authentication across the platform.

Standalone Improvements

Resource Management – Budget Creation Control

A new application setting allows organisations to disable automatic budget creation within the Resource Management module. This is particularly useful for customers who manage budgets in an external system and import them into myPARM, preventing duplicate or conflicting budget entries from being generated automatically during the resource planning process.

Resource Management – Budget Valid From for Future PLAs

Budget records created for PLAs that start in the future are now correctly dated. Previously, budgets for future PLAs were created with a "Valid from" date set to the PLA's start date, which could result in invalid future-dated entries. The system now ensures the budget is created with the appropriate current-period date, maintaining data consistency in resource planning.

Resource Management Dashboard – Organisational Unit Filter

A new standard dashboard — Resource Utilisation per Organisational Unit — has been added to the Resource Management module. Based on the existing Resource Utilisation Assignments dashboard, it introduces an organisational unit filter, enabling managers to analyse resource utilisation broken down by their specific part of the organisation.

Portfolio Management – Project Container Information

The portfolio management project assignment grid now includes a dedicated Project Container column as the first column, with sorting defaulting to Project Container and then Project name in ascending order. The panel width has also been increased to improve readability. These adjustments make it easier for portfolio managers to identify and organise projects by their container at a glance.

Microsoft Entra Integration

Support for Microsoft Entra (Azure Active Directory) employee import and Single Sign-On (SSO) has been configured for the platform. This enables organisations using Microsoft Entra as their identity provider to synchronise employee records and allow users to log in to myPARM using their existing corporate credentials.

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