Changepoint 2017 Service Pack 1 General Patch What's New

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Product Management
Changepoint Canada ULC

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Introduction

We are very pleased to provide preliminary information about the next release of Changepoint: Version 2017 Service Pack 1 (2017 SP1) General Patch.

The Changepoint 2017 SP1 General Patch introduces new enhancements for the Resource Scheduling Worksheet, Resource Request creation and additional general enhancements, furthering our commitment to assist the market and our customers in solving their most critical business problems with our market leading PSA/PPM solution.

Target Release Date

The Changepoint 2017 SP1 General Patch is targeted for general availability by June 30, 2018.

All product documentation and software for this release will be available through the standard channels. Contact your project consultant, customer care or customer success representative for assistance.

Resource Management Enhancements

Introduced in Version 2017 SP1, the Resource Scheduling Worksheet (RSW) is an interactive, high-performing, Gantt/calendar style display of resource demand and capacity, which resource managers can use to do the following:

View workloads: Graphically see the details of demand assigned to resources as well as their overall capacity, with red, yellow and green visual color indicators.

Staff new work: Using formal resource requests or more informal methodologies, resource managers have visibility into upcoming work and can quickly make staffing decisions based on the current demand assigned to resources, while ensuring the selected resource has the matching function, qualifications or other characteristics required.

Balance workloads: Using simple drag-and-drop functionality, resource managers can move work across the timeline or from one resource to another to ensure workloads are balanced.

Ensure the best resource is selected: Having access to all the important criteria will ensure that the resource manager selects the most appropriate resource for the work.

The new RSW will increase the efficiency and effectiveness of real-time, resource-based assignment decision making, which results in better engagement, improved resource utilization, greater customer satisfaction, and ultimately, improved revenue and profitability.

New Resource Scheduling Worksheet Functionality

The General Patch introduces some additional functionality that will enhance the user experience of the RSW, making staffing and balancing workloads even easier for the resource manager.

Pinning items

Depending on the scenario, it can be useful for the resource manager to be able to 'pin' some items, to ensure they are not filtered out when quick filters are applied. A specific demand item can be pinned, keeping that item and its associated resource/workgroup visible, or the resource can be pinned, keeping that resource and all associated demand items visible. For example, if a resource request is being fulfilled, the item can be pinned. If a resource is leaving the organization and the resource manager is looking for a suitable replacement, the resource can be pinned. Any quick filters that are applied are ignored for the pinned items.

Quick filter on Availability

To assist resource managers in finding an available resource, a quick filter on availability has been added. Once the resource manager has identified and (optionally) pinned a resource or demand items, s/he can then use quick filters to narrow down the choices. For example, there may be a requirement for a resource who has a specific function or is in a specific location. Once those quick filters have been applied, the resource manager can also filter on availability. The availability filter works in conjunction with the other quick filters, further narrowing down the choices.

A specific start date, finish date and effort required can be input, in scenarios where the resource manager is staffing a specific demand item.

In workload balancing scenarios, the resource manager can quickly filter resources that have either high or low utilization percentages (total demand divided by capacity for the timeframe specified) or billable utilization percentage (billable demand divided by capacity for the timeframe specified). The date range can be more generic, e.g. 'within the next 30 days'.

Edit Planned Start, Planned Finish and Planned Effort in the Grid

Resource managers can edit the planned start, planned finish and planned effort in the grid. Note that changing the planned start or planned finish will behave the same as dragging the start or finish in the gantt: the item will not be shifted; it will be expanded or shrunk. If you wish to shift the item and leave its duration the same, drag it in the gantt. If the item has a manual

loading method, you will be warned that your action will remove the manual effort allocation. You can refresh the item to remove your change.

When planned effort is changed, the RSW will attempt to leave any existing manual effort distributions as they are, and distribute additional effort to working days that do not have effort. In some cases, for example the effort value is lowered, demand must be re-distributed.

Edit Planned Effort in Daily or Fiscal periods in the Grid

Resource managers can edit effort in the grid for daily or fiscal period allocations. Select one of "Daily" or a set of fiscal periods from the "Switch Fiscal Periods" button. Select "None" if you do not wish to display the effort distribution.

When a user makes a change to a daily or fiscal period cell, the loading method will be changed to "manual" to ensure the distribution is not lost. The resource manager can change the loading method back to "auto", if desired. However, any manual effort distributions will be lost if the planned start / finish / effort is edited on the assignment.

If the value in a fiscal period cell is changed, the effort will be evenly re-distributed to the working days within the fiscal period, removing any manual allocations that may exist. This behavior will be enhanced in a future release to keep the manual distributions, if possible (similar to changing the planned effort total, above).

For project team records, the "net" demand (project team effort minus effort for task assignments) is distributed to fiscal periods. The net effort can be re-allocated within the fiscal periods that fall into the project team start and finish dates. If changes to the dates or total effort are desired, the resource request must be edited and refreshed to the RSW. The effort distribution will be lost; thus, changes to the dates and total effort should be done first, then the effort distribution can be done.

When a resource request is actioned, the assigned resource field is populated and the workflow stored procedure step "WFCALC_Approve" or "WFCALC_Assign" is run, the effort distribution will be maintained for the assigned resource. If changes were made to the resource request after the effort distribution was modified, it may result in the distribution being lost when the request is assigned to a resource.

Change Loading Method, Completed, Locked and Soft-Booked in the grid

Users will be able to change the above information for task assignments, giving them more flexibility for new and existing items. The initial loading method will be the same as the source item when demand is dragged to another resource and can be changed, if desired. Prior to the

general patch, the loading method was set to manual to preserve any manual effort allocations that may have existed.

Note: To optimize performance in the RSW, if the loading method is changed to one that replaces past information with actuals, the actuals will be evenly distributed between the actual start date and today's date and will not reflect the actual time entries until the item is saved and the worksheet is refreshed.

Also note: If you change the loading method and then change it back to its original value, the total effort and distribution of effort may not be the same as their original values. If you want the values to be the same as before, refresh the item in the RSW.

More Flexible filter for demand items

When creating a filter in the RSW, the hard-coded 'next 90 days' is replaced with a user input value "next X days". It can be saved with the filter. Any existing filters that have the existing 'next 90 days' option will be converted to an input value of 90 days, which can be changed after the upgrade if desired.

Options when removing all demand from a resource

Users can now set a preference in the RSW 'Settings' that determines the behavior when all demand is removed from a resource via the drag-and-drop. The choices are:

- Delete the source item or lock it when it cannot be deleted
  - o If 'delete or lock' is selected, the source item will be deleted when the effort is zero after the re-assignment. If there is still effort on the source item or it cannot be deleted (e.g. a task assignment has time booked against it), it will not be deleted but will be locked. There may still be effort if a task assignment has a loading method that replaces past with actuals. If only past data remains on the source, the item will be locked but not deleted.
- Lock the source item
  - o If 'Lock' is selected, the task assignment will be locked.
- Leave the source item un-locked
  - o If 'Leave the source item' is selected, the assignment will not be locked.
  - o This option is the behavior before the general patch and will be the default option.

Note: 'Lock' refers to task assignments only, i.e. the 'locked' flag will be set, which prevents the assigned resource from booking any more time against the task.

The source item is considered to have no effort when:

- All demand is re-assigned to the target item and the source item has zero effort, or
- For task assignments with loading methods that replace past with actuals, the total effort on the source is equal to the actual effort (meaning no planned effort is associated with the source item).

Create Resource Request from the "New" menu or Project Profile

To streamline the creation of resource requests, they can now be created from the "new" menu or from the project 'Actions' menu, resulting in a simplified user experience for project managers in a more formal resource management environment.

Instead of starting from the project team, projected resources or task assignment, filling out the information and then creating a resource request from that record:

- From the 'new' or 'actions' menu, select 'resource request'.
- The resource request dialogue is launched, where the user fills out the customer (mandatory), engagement (mandatory), project (see below) and task (see below) and all the other information that is available on the resource request, including configurable fields. The engagement settings will determine which type of resource request is enabled.
- The user can directly type ahead in the 'project' field (projects the user has access to and have resource requests enabled at the project or task level), and it will auto-fill the customer and engagement. The user can directly type ahead in the 'engagement' field (engagements the user has access to and have resource requests enabled at the engagement, project or task assignment level), and it will auto-fill the customer.
- The user must select a project before s/he can select a task. The selected engagement will pre-filter the project selection, and the selected project will pre-filter the task selection.
- The user can select a function, which will automatically populate the qualifications associated with that function. If a different set of qualifications is desired, leave the function field blank and manually select qualifications.

When the request is saved, the originating record will be created, depending on what level resource requests are enabled for that engagement:

- Requests are enabled at the engagement level: Customer/engagement are mandatory, projected resource level request and projected resource record is created
  - Access requirement: edit access to the engagement (usual rules apply, i.e. having 'edit engagement' feature or having 'create engagement' plus the 'grant' access

tab option) or view access to the engagement and the 'access projected resources' feature.

- Requests are enabled at the project level: Customer/engagement/project are mandatory, project team level resource request and project team record is created
  - o Access requirement: the user has the 'edit project' feature and is the project manager. Or, when the project has 'allow project editors to take ownership of the project' selected, the user has the 'edit project' feature and is a project editor.
- Requests are enabled at the task assignment level: Customer/engagement/project/task are mandatory, task assignment level resource request and task assignment is created.
  - o Access requirement: the user has the 'manage tasks' feature, is a project manager, project editor or summary task manager (and the project allows summary task managers to edit tasks).

In all cases, the "Assigned resource" field will not be populated onto the source record. Workflow must be configured to correctly route the resource request and populate the assigned resource at the appropriate time (using either a "WFCALC_Approve" or "WFCALC_Assign" stored procedure step type – the latter is for project-level resource requests only). The assigned resource field can be populated onto the resource request, if desired, to save the resource manager some time (the field is disabled for task-level resource requests). The resource manager can leave that resource populated when approving the request, or can select someone else, as necessary.

Resource request configurable fields will behave as any other entity (e.g. default values, conditionals, field security settings). The 'template' values that are specified at the project level will not be relevant when the 'new' request UI is used to create a resource request.

The resource request 'save' action will initiate workflow.

The resource request can also be created from the project 'actions' menu when project-level or task assignment resource requests are enabled (customer/engagement/project will be pre-populated; task is mandatory if requests are enabled at the assignment level).

To make it easier for users to access resource requests, the project team section on the project profile page will contain a link to the resource request profile.

Users will be able to copy resource requests using a button on the resource request dialogue or a 'copy' action from the resource request profile. The new request will contain all the information on the source request, and will be validated and sent into workflow as a new record.

Other General Enhancements

Create additional billing role-only rate when creating an engagement from an opportunity

To ensure all demand is captured for resource management purposes, many organizations use generic or placeholder resources on opportunity services. To streamline engagement creation from the opportunity, new options are available for creating the engagement billing rates:

- Create the resource/billing role (staffing level) combinations as-is from the opportunity
- Create the resource/billing role (staffing level) combinations plus an additional rate with only the billing role
- Create rates with only the billing role and no resources

Creating billing rates with a role and no resource allows the rate to be used on any task assignment, rather than only assignments for the specific resource associated with the billing rate.

Note: if there is more than one opportunity services row with the same resource and billing role combination or billing role, the one with the highest billing or cost rate will become the active rate, with the others being added to the billing rate history. Users can review the billing rate history after the engagement is created to modify the rates if necessary.

Add Expense Attachments After Submission

It will now be possible to add expense attachments further into the expense report process, allowing a smoother expense cycle and reducing the time to reimbursement and billing. Attachments can be added in the Enterprise user interface by the user or via central expense.

Expense reports that are at 'Approved by Finance' or 'Received' status cannot have any new attachments added.

Delegate Approvals and Update User Preferences from User Setup

Administrators have asked for a way to manage the preferences of a user. For example, if a user goes away and forgets to delegate approvals, the administrator can now do the delegation on behalf of that user. There is a new "Manage preferences" link from user setup that allows the administrator to access the 'Preferences' page for the resource, with a few exceptions:

- Security features
- Qualifications

- Miscellaneous
- Add-in installations
- Change password

Those options are either not relevant to the administrator or are already available in user setup and are redundant. The link is available for an existing resource and is not available during creation of a resource.

Option to Show or Hide the Cognos Toolbar

Administrators will have an option to display or hide the Cognos toolbar for reports, portlets and portals that are created from Cognos content. Hiding the toolbar may be desired to make the display cleaner, and to reduce the confusion and availability of undesired actions for users (such as 'save a snap-shot').

The option will be available in portlet management, portal management and report setup. The option will not affect Cognos workspaces.

Note: the options are cached and will not be applied until the next time a user logs in to Changepoint.