



# PMWeb Version 5.2

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## RELEASE NOTES

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## Overview

Several new features and a number of important enhancements are included in PMWeb version 5.2.03.

### Online Help System

For version 5.2.03 the online help system has been completely reinvented. Detailed help topics for virtually every record type and component of PMWeb have been written and are available by clicking the question mark button -  - in the toolbar of most records. You can also search for topics and contents are linked by keywords.

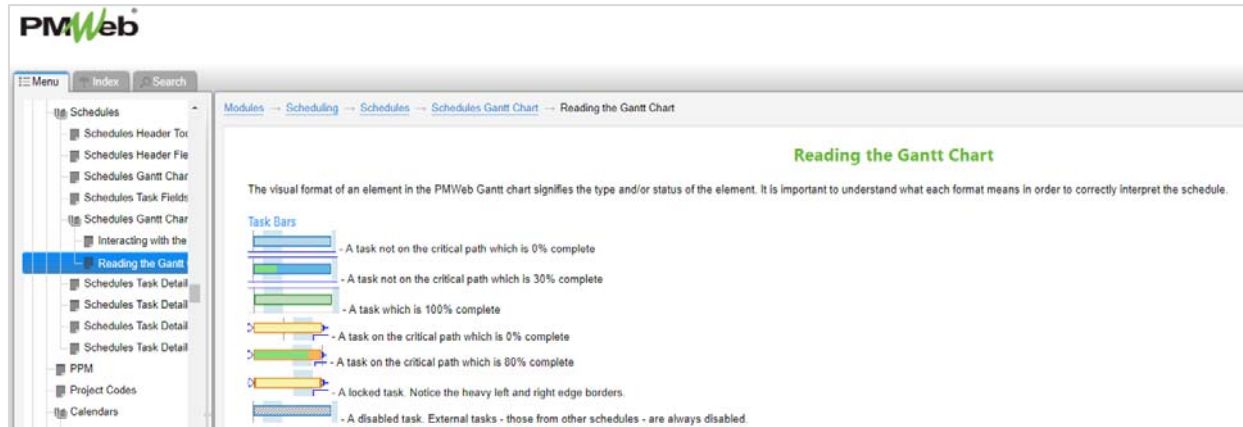


Figure 1 - System-wide Context Sensitive Help with Index and Search

### Resource Management

An optional module – “Resource Management” – has been added to the PMWeb Toolbox. When you license Resource Management you acquire access to two new PMWeb record types, Org Chart and Requirements. (Please contact your PMWeb sales representative for information about Resource Management.)

#### Org Chart

Use Org Chart records to create graphical hierarchies detailing any part of your enterprise and drag and drop PMWeb labor and equipment resources to assign them. Org Charts can apply to a single project or your entire portfolio – you can create as many of them as you wish.



Figure 2 - Drag and Drop to Build Interactive Org Charts

Because they are PMWeb records, each Org Chart can have notes, attachments, be routed for Visual Workflow approval.

## Requirements

Requirements are any work or event that needs to be staffed. PMWeb Requirements records allow you to:

- **Define** the work. Requirements can be generic – “Attend office party” – or very specific. In fact, a requirement can be linked to a single line in a single PMWeb record if you wish. Each requirement can contain rich metadata, including region, skills needed, estimated hours, and much more.

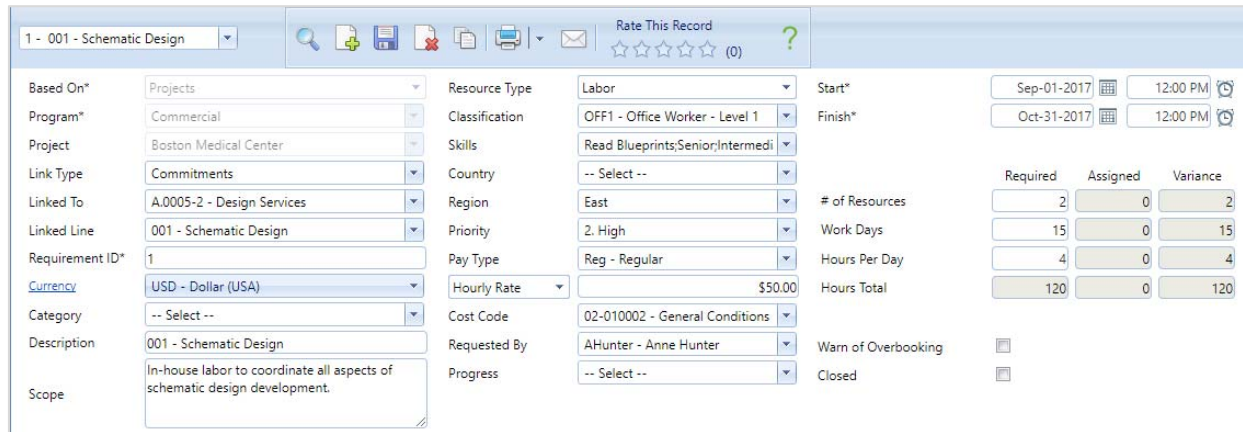


Figure 3 - A Requirement Linked to a Specific Line in a PMWeb Commitment Record

- **Assign** labor and equipment resources. Each requirement can be assigned to any number of resources and each assignment includes hours per day, percent effort, pay type, and more.

| Assignments                                                                         |               |                                    |             |            |             |             |               |                          |                |          |                                |               |                    |
|-------------------------------------------------------------------------------------|---------------|------------------------------------|-------------|------------|-------------|-------------|---------------|--------------------------|----------------|----------|--------------------------------|---------------|--------------------|
| Specifications                                                                      |               |                                    |             |            |             |             |               |                          |                |          |                                |               |                    |
| Scoring                                                                             |               |                                    |             |            |             |             |               |                          |                |          |                                |               |                    |
| Ratings                                                                             |               |                                    |             |            |             |             |               |                          |                |          |                                |               |                    |
| Notes                                                                               |               |                                    |             |            |             |             |               |                          |                |          |                                |               |                    |
| Attachments                                                                         |               |                                    |             |            |             |             |               |                          |                |          |                                |               |                    |
| Drag a column header and drop it here to group by that column                       |               |                                    |             |            |             |             |               |                          |                |          |                                |               |                    |
| Edit Add Delete Refresh Layouts Preview Conversions                                 |               |                                    |             |            |             |             |               |                          |                |          |                                |               |                    |
|                                                                                     | Resource Type | Resource                           | Start       | Start Time | Finish      | Finish Time | Hours Per Day | All Day                  | Assigned Hours | % Effort | Classification                 | Pay Type      | Currency           |
|  | Labor         | <a href="#">0003 - Karen Wagon</a> | Oct-02-2017 | 8:00 AM    | Oct-06-2017 | 12:00 PM    | 8             | <input type="checkbox"/> | 20             | 50.00%   | OFF1 - Office Worker - Level 1 | Reg - Regular | USD - Dollar (USA) |
|  | Labor         | <a href="#">0011 - Peter Wagon</a> | Oct-02-2017 | 12:00 AM   | Oct-06-2017 | 12:00 PM    | 8             | <input type="checkbox"/> | 20             | 50.00%   | OFF1 - Office Worker - Level 1 | Reg - Regular | USD - Dollar (USA) |

Figure 4 - Assign Labor and Equipment Resources

Requirements and assignments can be posted to the PMWeb Cost Ledger if you wish.

## Bluebeam Integration

An optional integration with Bluebeam has been added to the PMWeb Toolbox module. Bluebeam is a suite of applications that use PDFs to facilitate markup and collaboration. The PMWeb Bluebeam Integration allows users to:

- Initiate a Bluebeam session from any PMWeb Attachments tab or Document Manager folder. (PDFs enjoy special protections within PMWeb while they are active in a Bluebeam session.)
- Use PMWeb contacts list to invite participants
- Monitor the session from within PMWeb using a new record type – Bluebeam Markups. Bluebeam Markups records are automatically created when a Bluebeam session is initiated from a PMWeb Attachments tab or Document Management folder. Within the PMWeb Bluebeam Markups record you can:
  - View the markups log, directly downloaded from Bluebeam
  - Open the Bluebeam session by clicking a button in the toolbar
  - View and manage the PDFs linked to the session
  - Close the Bluebeam session and release the PMWeb PDF files

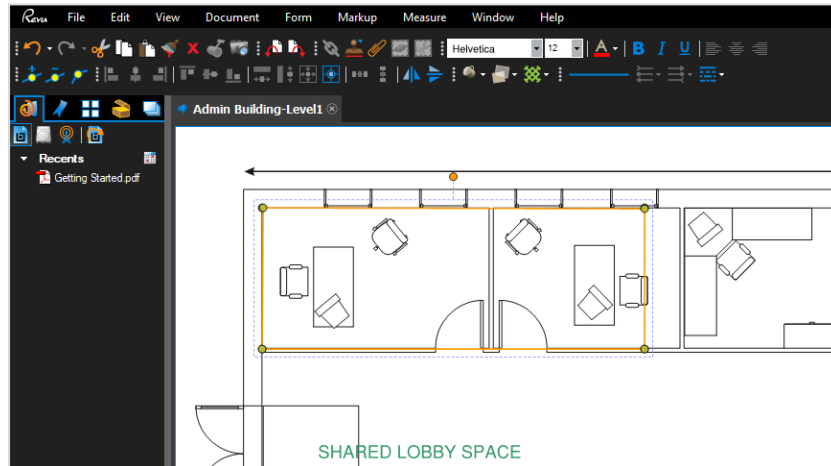


Figure 5 - PMWeb now Integrates with Bluebeam

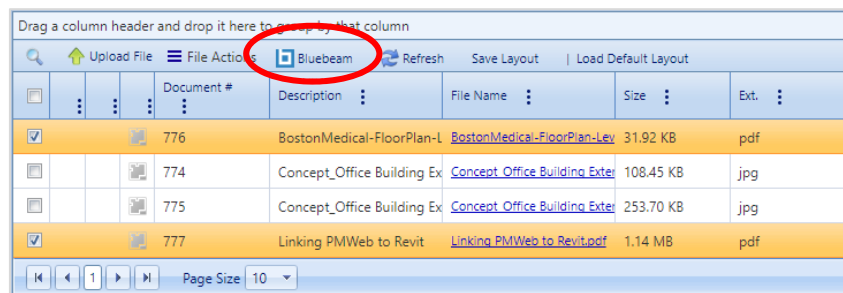


Figure 6 - Click the Button to Immediately Create a Bluebeam Session

Please contact a PMWeb sales representative to learn more about the PMWeb Bluebeam Integration.

## New Features and Enhancements

| FEATURE                            | COMMENTS                                                                                                                                                                                                  |
|------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Online Help System                 | An interactive, context-sensitive, help system covering virtually all aspects of PMWeb was added. See the Overview, above, for more information.                                                          |
| Bluebeam Integration               | An optional integration to the Bluebeam PDF markup suite was added. See the Overview, above, for more information.                                                                                        |
| Org Chart                          | A new record type, Org Chart, was added. See the Overview, above, for more information.                                                                                                                   |
| Org Chart BI Reports               | A BI report form and a BI list report were added for the new Org Chart record.                                                                                                                            |
| Requirements                       | A new record type, Requirements, was added. See the Overview, above, for more information.                                                                                                                |
| New Default View Buttons           | In Model Manager, two buttons were added: "Save as Default View" and "Load Default View".                                                                                                                 |
| Model Manager Collapse Header      | A collapse header control was added to the Model Manager record type.                                                                                                                                     |
| "Region" Fields Added to Resources | A new user-defined list, "Region", was added to labor and equipment resource records.                                                                                                                     |
| Lists Added to API                 | The records under Portfolio/Lists/Lists were added to the API                                                                                                                                             |
| Load On Demand List Enhancements   | Load on demand lists now highlight the currently selected value and do not need to be cleared to view the list.                                                                                           |
| "Estimated Costs" Worksheet Column | A new worksheet column value – Estimated Costs – was added to the Cost Ledger. In version 5.2 Requirements and Requirement Assignments are posted to this column which can be included in custom reports. |
| Optimized Queries                  | Queries throughout PMWeb were rewritten, tuned, and tweaked to significantly increase the speed of page loads and simultaneously decrease the load on system resources.                                   |