

19.3 PRODUCT RELEASE NOTES

FOR PROGRAM MANAGEMENT ENHANCEMENTS

NOVEMBER 11, 2019 - FINAL VERSION



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WELCOME

The purpose of the **Product Release Notes** is to prepare administrators for the upcoming 19.3 release. The main goal of this document is to provide an overview of key features that are planned and committed for delivery.

PROGRAM MANAGEMENT

This section focuses on updates to JAGGAER ONE Program Management.

Ability to Perform Mass Updates for Project Team Membership

When a user leaves or changes their job position, a large number of projects may be affected by this change. Previously, users had to be added and deleted from project teams manually. This could be a cumbersome process when an organization has a large number of projects.

In 19.3, we have provided the ability to perform mass changes to an individual user's project team assignments through the standard platform search and select method or through the standard import/export process.

Customer Impact



- Related Solutions: Program Management
- Feature Activation: This feature is **ON** by default, but optional for use.
- New User Rights related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- This feature does not impact end users.

ADMINISTRATOR IMPACT

- Super users can use the search/filter function or the import function to change a user's project team memberships through a mass update. Follow the steps below:

1. Navigate to **User Management**  > **Manage Users** and select a user account.
2. Depending on the type of changes to be made, take one of the actions below:
 - To **Add Project Teams**: Click the **Add to Project Team** button in the top-right corner. The **Add to Project Teams** page appears.
 - To **Remove Project Teams**: expand the **More**  drop-down menu and click **Remove from Project Teams**. The **Remove from Project Teams** page appears.
3. Use one of the methods below to make changes to the user's project team memberships:

Search & Filter Method:

1. Use the standard platform search/filter feature to locate relevant project teams.
2. Select the checkboxes to the left of the **Project Code** column for all appropriate teams. If necessary, select all project teams by clicking the **Select All** option which appears above the list.
3. Click **Select**.

Import Method:

1. Click the **Import** button in the top-right corner of the screen.
2. Click **Download Project List**.
3. Save the Excel project file locally.
4. Edit the data in the Excel workbook and save the changes:
 - The Excel template contains the **Project Code** and **Project Title** for all projects appearing onscreen. If a search filter was applied, only projects appearing in the filter results will appear in the Excel workbook.

Note: Only the **Project Code** field is mandatory in the workbook. If the **Project Title** appears in the Excel file, the platform will verify that it matches the **Project Code**.

 - **To add a user to project teams:** Delete the rows of **Project Codes** and **Project Titles**, except for the projects to which the user will be added. If necessary, add additional **Project Codes** to column A and optionally add **Project Titles** to column B.
 - **To remove users from project teams:** Delete the rows of **Project Codes** and **Project Titles** for the project teams on which the user will remain.
5. Return to the **Add to Project Teams** or **Remove From Project Teams** page.
6. Click **Choose File** and locate the file to import.
7. Click the **Import Excel** button.
8. If there are errors in the import file, they will be displayed onscreen. If not, the project list will update with checkboxes for the relevant projects selected.
9. Click **Select** to finalize the changes.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.