



Actify APM – Release Highlights

This document describes the new features and improvements in this release and is intended for a management audience. See the Release Notes for details or contact your ACTIFY representative for further information.

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Release Theme

This release introduces a new no-code automation capability and provides much improved dashboarding for both managers and team members to better summarize Status and highlight items needing immediate attention, especially for programs involving multiple projects.

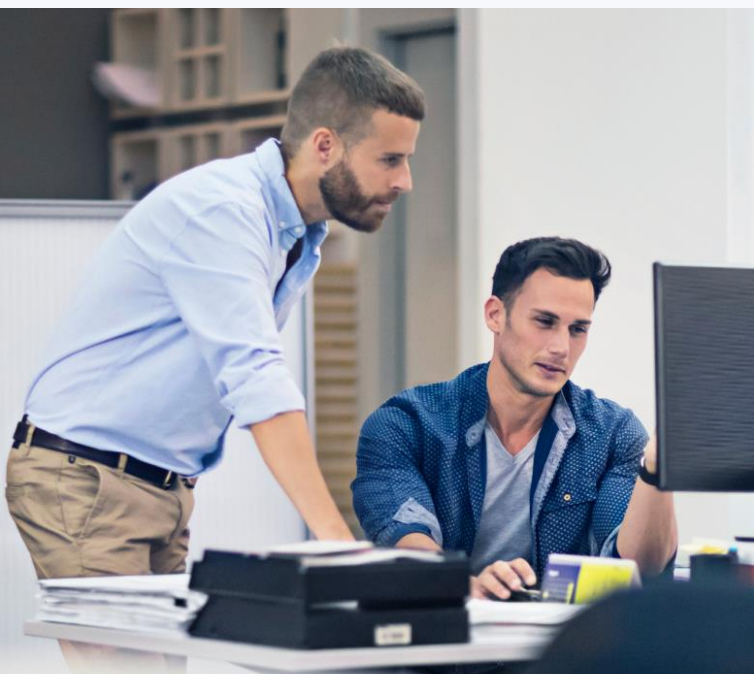
New Module

ACTIFY Automate

This release includes a powerful platform capability for automating recurring activities within APM or between APM and other business systems, such as ERP or CRM. Using a drag-and-drop “recipe” builder, Admins can configure processes which conduct decisioning or branching and perform a variety of actions, such as reading from or writing to APM or another (supported) system, generating notifications or performing some business logic. Automate runs these recipes as requested or when a user-defined trigger condition arises, with monitoring, logging, diagnostics and notifications to provide a low-touch solution for frequently occurring activities.

Automate includes a library of ready-to-use business system Connectors, including for PLEX, SAP and ORACLE as well as sample (editable) Recipes to:

- Auto-create a series of related Projects for a Program from identified Templates
- Auto-create Parts into the PLEX Item Master from the associated CAD deliverables in a Program
- Auto-update APM with key Milestone status when PLEX changes



New Features

Program-Project Dashboard

This new Dashboard presents clear progress status for the projects associated with a specific Program, using RYG color-coding so that managers see the current status in a “one page” view and can quickly identify those Projects or workflow activities that need attention. This new Dashboard also provides flexible interactivity and arrangement features (see Supergrid)

Folder & List Configurations

Customer Admins can configure preferred folder structure(s) to be used in Programs, so that typical deliverables and content management working practices can be reinforced by APM – for APQP deliverables, for example or to follow internal company methodologies. Similarly, standard selector lists can be defined for key Program properties to drive consistent usage.

My Tasks & Approvals

The Project Dashboard has been significantly enhanced to allow role-based filtering so that users can quickly see “their” Tasks or those assigned to a specific user/role.

Additionally, this Dashboard now highlights Tasks with Outputs pending Approvals, so that they – or others that need attention due to a pending Requires Review or that are Overdue – can be quickly identified.

Alternative view tabs for the Project also include a new Timeline option, in addition to the Workflow and Spinfire Web visualization options.

Timeline View

The dates and relative positioning of Phases, tasks, milestones over time are displayed with color-coding and a configurable timescale in a Gantt-like graphical view. Nesting controls allows users to interactively expand programs/projects/phases to choose the relevant level of detail and can filter the view to show combinations of individual tasks and/or milestones.

Date Adjuster

Delays often occur in program management, arising from Customer plan changes or due to internal or supply-chain events. Users can specify a delay (to move dates out) or an acceleration (to move dates in) to a specific project; APM will apply the adjustment to (not yet Completed) Tasks in the Phase or to all the downstream Target dates and log an explanatory reason for the change.

Improvements

Supergrid

This release includes significantly improved table-view interactivity, allowing users to personalize their experience with features such as select, re-sequence, re-size, hide columns, manage frozen/scrolling, sort or search within columns and group rows for pivot-like presentation. Additionally, color-coding and inline icons improve immediacy and readability. Supergrid views also provide built-in export to Excel, state-saving and faster interactive performance.

1-Click Project Filters

In addition to role-based filtering, the Project Home has been enhanced to provide clickable Status/KPI “tiles” , for Overdue, or pending Approval items, so that users can filter the display to highlight those Tasks (others are shown dimmed for context).

Also, Milestones are visually differentiated from normal Tasks in a side-by-side layout.

Breadcrumbs & Navigation

Improved navigation and clickable breadcrumbs facilitate access to key Dashboards and presenting and accessing project-to-program context., along with a Quick Nav option to directly skip to a specific project. In-project context is improved across all views with auto-numbered Phases.

Back-Dating Start Dates

When an existing program is brought into the system, users can now back-date Actual Start/Finish Dates to reflect work begun or completed before APM was being used so that an accurate activity history is reflected in the system.

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