PREGARE Orario 15 Release Notes

October 2024

Web I Laboratories, Inc.

Table of Contents

Introduction

We introduce the additional and improved functions of our new version of PREGARE Orario (hereafter referred to as PREGARE) “PREGARE15” in this document.

* The contents of this document are subject to change without notice.

1. System Environment

System requirements for PREGARE15 are as follows.

(1) Server requirements

Red Hat Enterprise Linux (RHEL) Edition
• Red Hat Enterprise Linux 8/9 • Java-17-openjdk • PostgreSQL 12 or later • Apache Tomcat 9 • Apache HTTP Server 2.4 • 8GB or more of RAM • Enough free space to store PREGARE data in addition to the amount required to run the OS • (When using mail function) Mail server * Red Hat Enterprise Linux 8 is supported for updates only.
Windows Server Edition
• Windows Server 2016/2019/2022 Standard edition • Amazon Corretto 17 • PostgreSQL 12 or later • Apache Tomcat 9 • Apache HTTP Server 2.4 • 16GB or more of RAM • Enough free space to store PREGARE data in addition to the amount required to run the OS • (When using mail function) Mail server * Windows Server 2016/2019 is supported for updates only. * Software required for Windows Server edition is included on the product CD.

(2) Client requirements

- Google Chrome
- Microsoft Edge (Chromium edition)

2. Major Additional Functions

2-1. Added issue tracking system linkage function

We have added a new issue tracking system linkage function so that issue information of projects managed with Jira Software (cloud edition) or Redmine can be managed as project schedules.

In newly launched businesses and unprecedented projects, the schedules and assignees of issues were managed separately in individual systems. However, by visualizing the issue information registered in each project's issue tracking system as a task in a bar chart, it empowers to better coordinate the schedule and assignees and issues. This also enable more accurate budget-actual management, which could not be achieved using an issue tracking system alone.

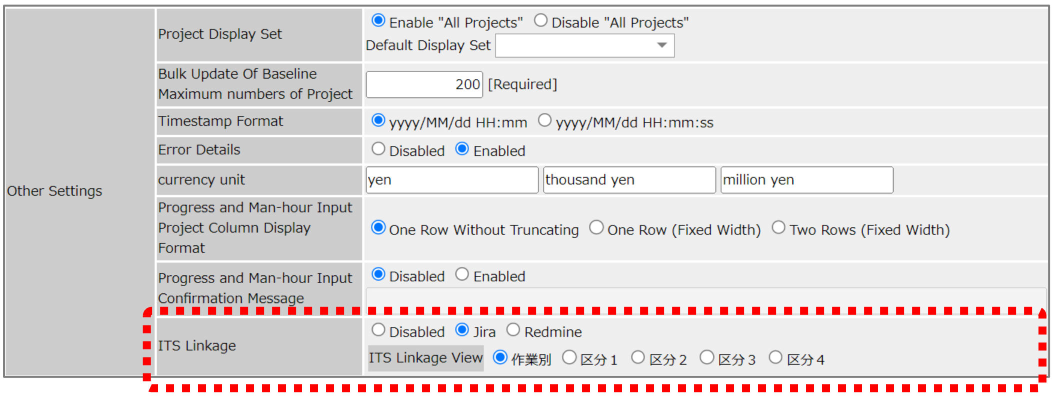
* It supports Jira Software (cloud edition) and Redmine as the issue tracking system target.

* To use this function, you will need to prepare your own instance of Jira Software (cloud edition) or Redmine.

(1) Setting items in System Settings

In "ITS Linkage" section of System Settings, you can configure whether to link issue tracking systems and which to link. Furthermore, you can specify which view to be used for the linkage.

< Settings Management Menu: System Settings screen >

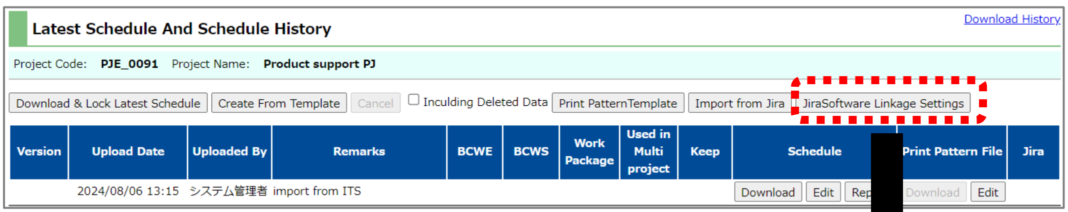


(2) Detailed settings for issue tracking system linkage

You can register required information for the target issue tracking system in “ITS Linkage Settings” button of Latest Schedule and Schedule History on Schedule tab.

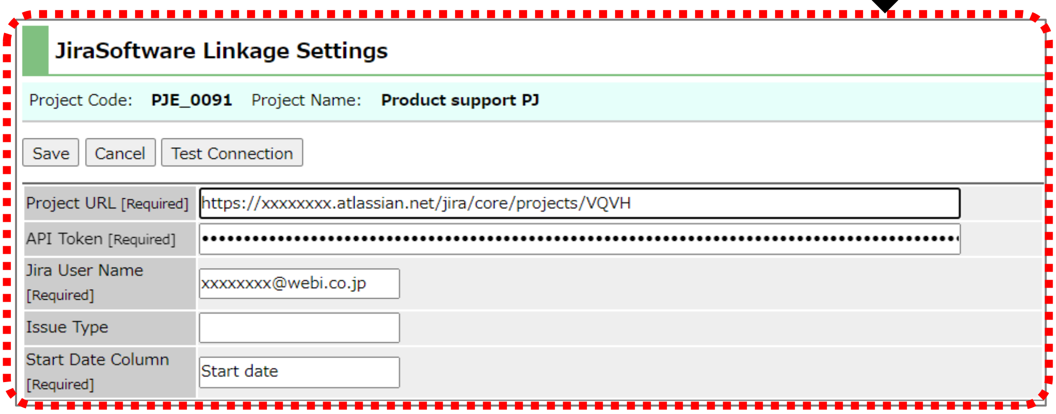
< Schedule tab: Latest Schedule And Schedule History screen >

E.g. Jira Software (cloud edition)



< Schedule tab:

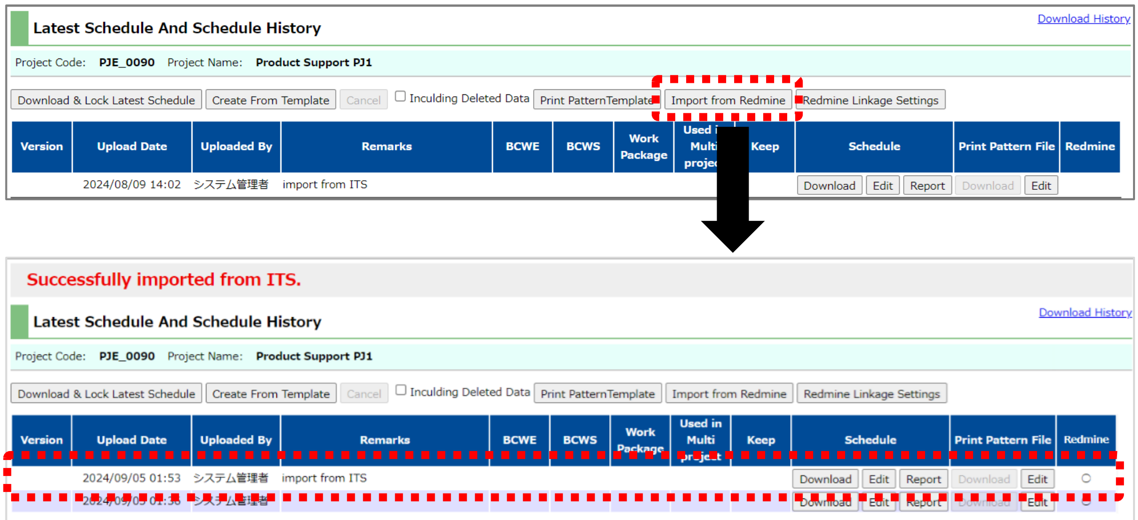
Issue Tracking System Linkage Settings screen >



(3) Importing issue tracking system data

You can import data from issue tracking system into a bar chart by clicking "Import from issue tracking system" button of Latest Schedule And Schedule History on Schedule tab.

< Schedule tab: Latest Schedule And Schedule History screen >



2-2. Enhanced Report function

2-2-1. Improved usability of report definitions

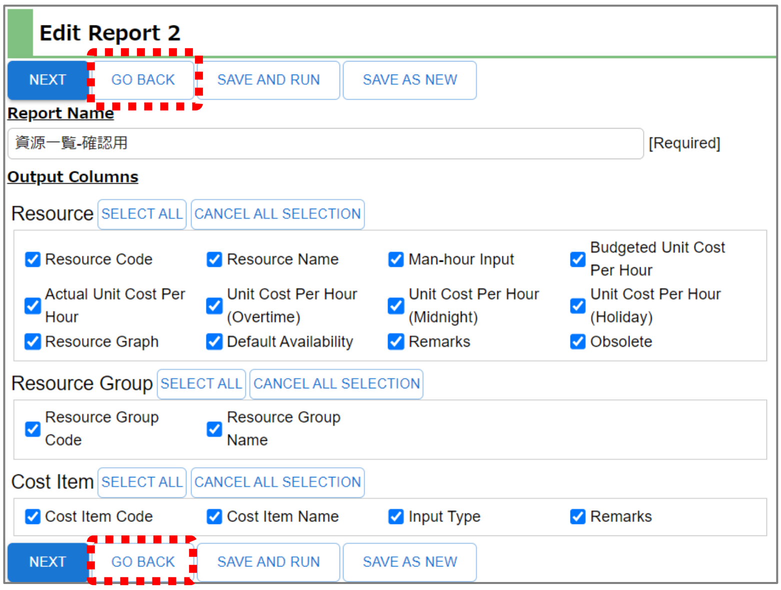
To make more efficient use of PREGARE data, we have made the following improvements to the report creation and output process.

(1) Added “Back” button to the new report creation / editing screen.
(2) Changed the setting method of “Column Label” on the new report creation / editing screen.
(3) Changed the default file name when downloading reports (CSV/Excel).

(1) Added Back button

Previously, when you clicked “Next” button on the new report creation / editing screen to advance to the next screen, you could not return to the previous screen. With the addition of “Back” button, you can return to the previous screen if you accidentally skipped the screen you want to edit or you need to edit the entered content.

< Report tab: New report creation / editing screen >



(2) Changed the setting method of “Column Label”

Previously, if you created a report and changed the item name used in that report in the field definition, the column labels in the report would not be the same as the changed field definition. Therefore, if you changed a field definition, you also had to change the column label of the report.

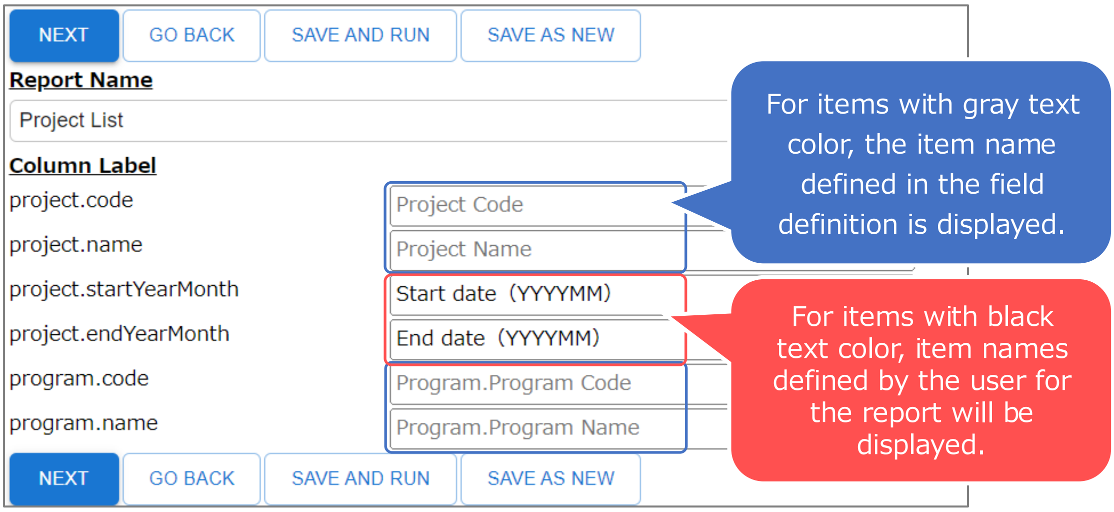
This time, we have made it possible to omit the entry of column labels. If omitted, the column label will be the item name in the field definition. This will automatically change the column label of the report to the changed item name even if the item name used in the report is changed in the field definition.

* The above does not apply to existing reports that were created before the introduction of PREGARE15. This applies to newly created reports.

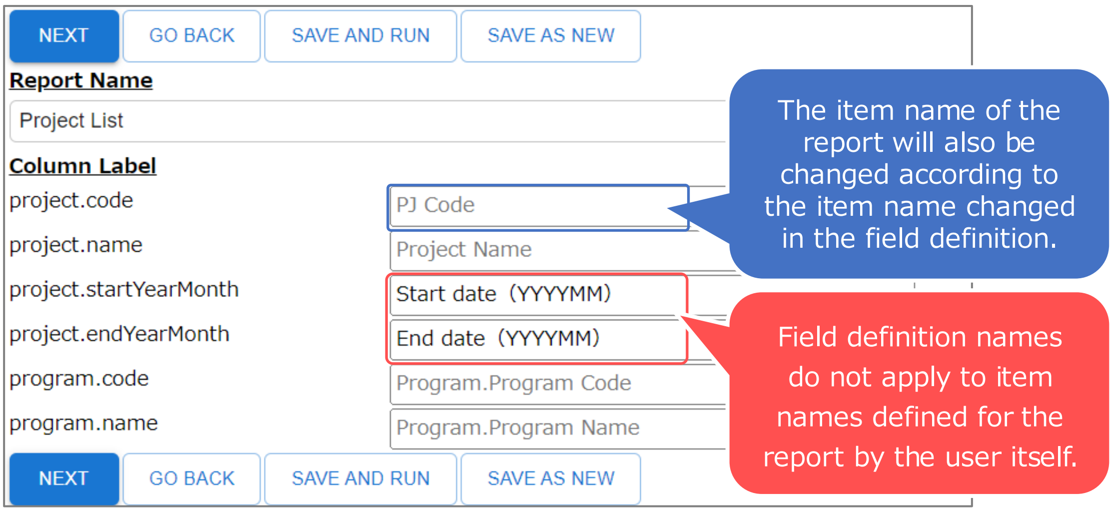
< Report tab: New report creation / editing screen >

E.g. When the field definition is changed from “Project Code” to “PJ Code” after registering the report definition

■ Before changing the item name in the field definition



■ After changing the item name in the field definition

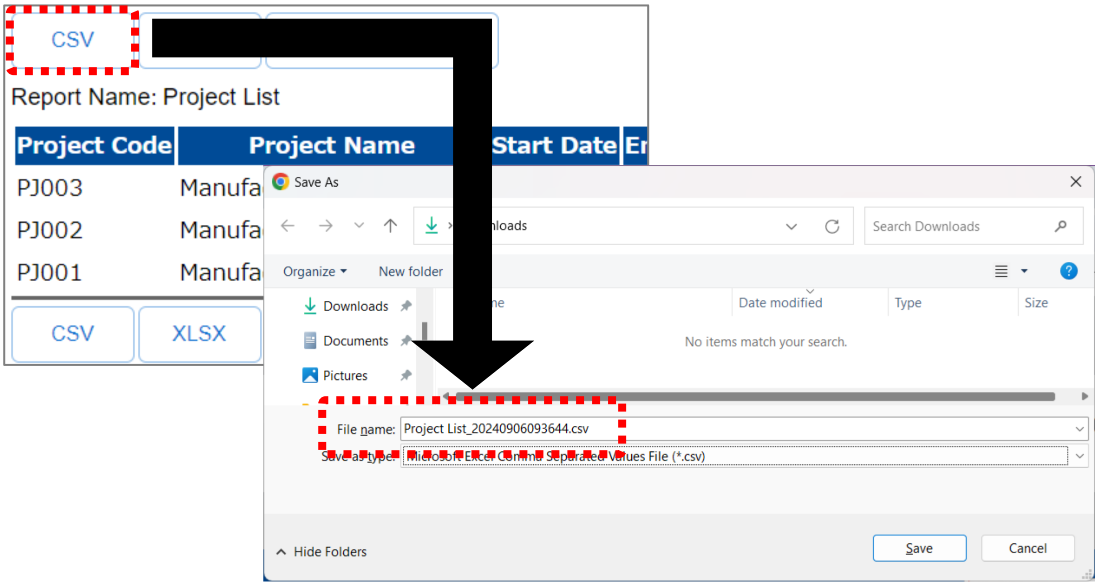


(3) Changed the default file name of output report (CSV/Excel)

Previously, the output file name was default to “report”, which made it difficult to distinguish amongst exports. To improve clarity and ease of identification, the default output file name has been changed to “{Report Name}_{YYYYMMDDhhmm}”.

* {YYYYMMDDhhmm} will be the date and time when the report is generated.

< Report tab: Report display screen > E.g. When CSV



2-2-2. Enhanced condition setting for report creation

We have made the following improvements to make it easier to extract target data when creating reports.

- Additional fields are now available as “Report Criteria For Project” in report definitions.
- Added “Resource filtering criteria” as filtering criteria for “Cost by Resource” and “Budgeted & Actual Cost By Resource” in Cost Report.
- Added “Resource Group” to “Select Report Axis” in Man-hour Matrix Report.
- Changed the future period that can be specified relatively when Time Aggregation Type is set to “Month” in Man-hour Matrix Report.

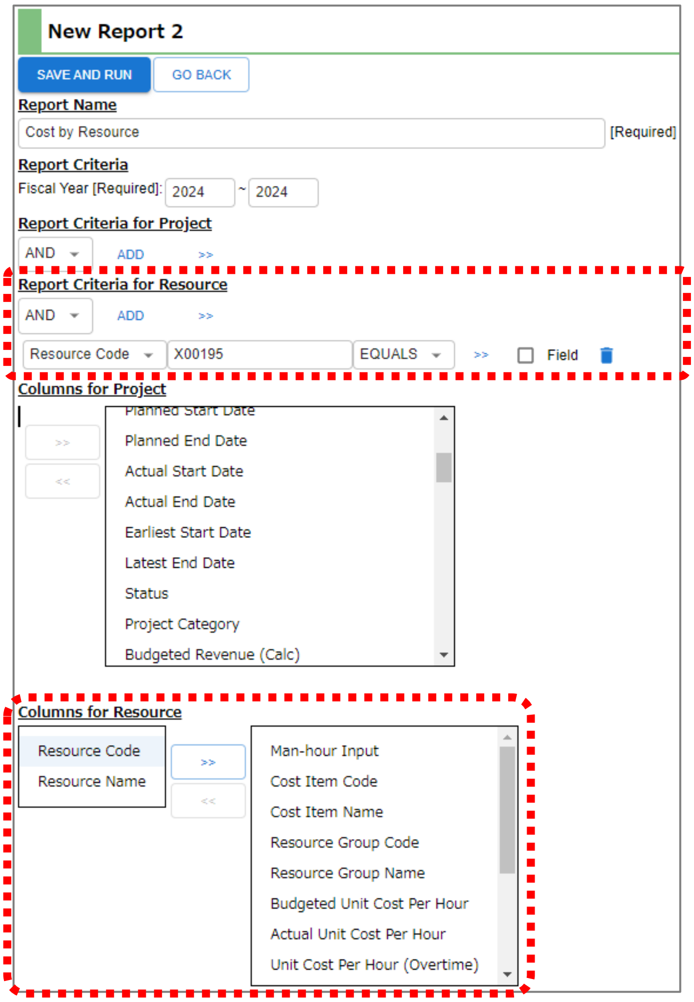
(1) Added additional fields to “Report Criteria For Project”

You can now select additional fields for projects as filtering criteria.

(2) Add “Resource filtering criteria” to Cost Report

The “Resource filtering criteria” is now available for output data with a Target Detail of “Cost By Resource” or “Budgeted & Actual Cost By Resource”. This feature allows you to specify resource-related filtering criteria and generate reports tailored to your needs.

< Report tab: Report creation screen > E.g. Target Detail: Cost By Resource

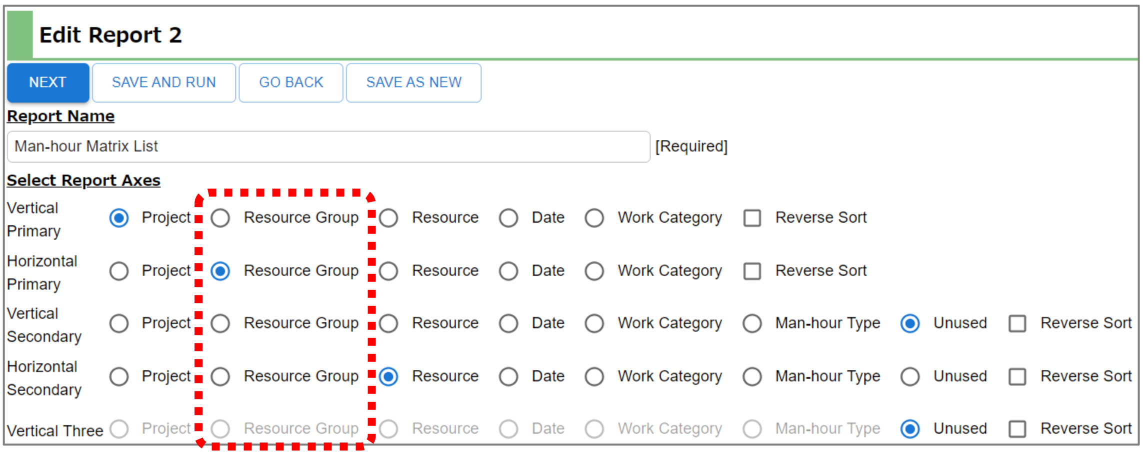


(3) Added “Resource Group” as a report axis in Man-hour Matrix Report

The “Resource Group” is now available to be selected as a report axis in Man-hour Matrix Report. This allows you to compare productivity by Resource Group.

* If “Resource” is selected as the Primary or Secondary axes, “Resource Group” will become unavailable.
* If no Resource Group is assigned to a Resource, the man-hours will be aggragated for all Resources without Resource Group.

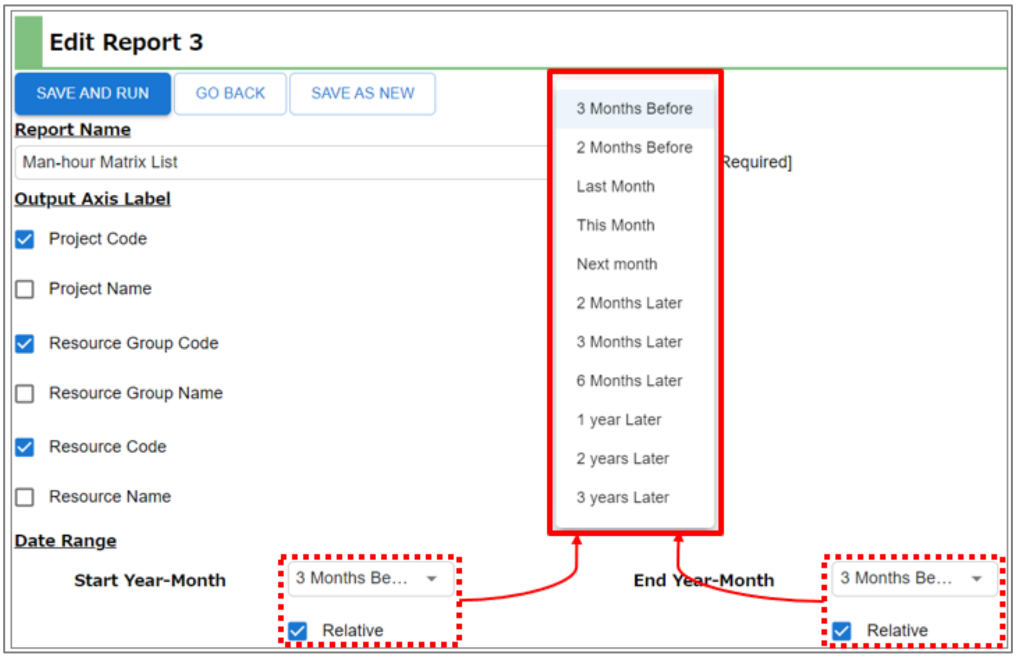
< Report tab: Report creation screen (Output target: Man-hour, Target detail: Man-hour Matrix) >



(4) Added relative specification of date range to Man-hour Matrix Report

When Time Aggregation Type is set to "Month" in Man-hour Matrix Report, the available future period was limited up to 3 months later. This has been expanded to include options for 6 months later, 1 year later, 2 years later, and 3 years later. This allows you to check the medium- to long-term Budgeted Man-hours.

< Report tab: Report creation screen (Output target: Man-hour, Target detail: Man-hour Matrix) >

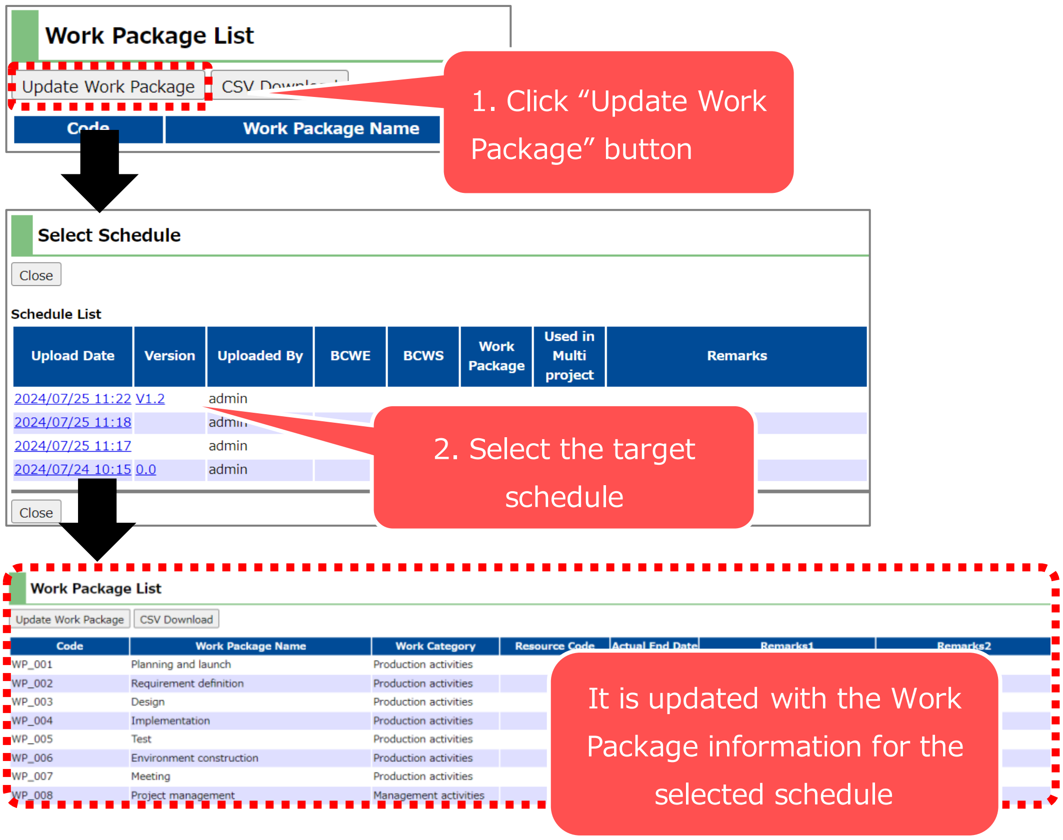


2-3. Enhanced profitability-related functions

2-3-1. Enhanced Work Package update function

Previously, if you wanted to update only Work Packages during project execution, you had to update Work Package as well as Budgeted Cost of Work Estimated and Budgeted Cost of Work Scheduled. This has been improved, and now you can update just the Work Packages from the Work Package List for each project on Project tab.

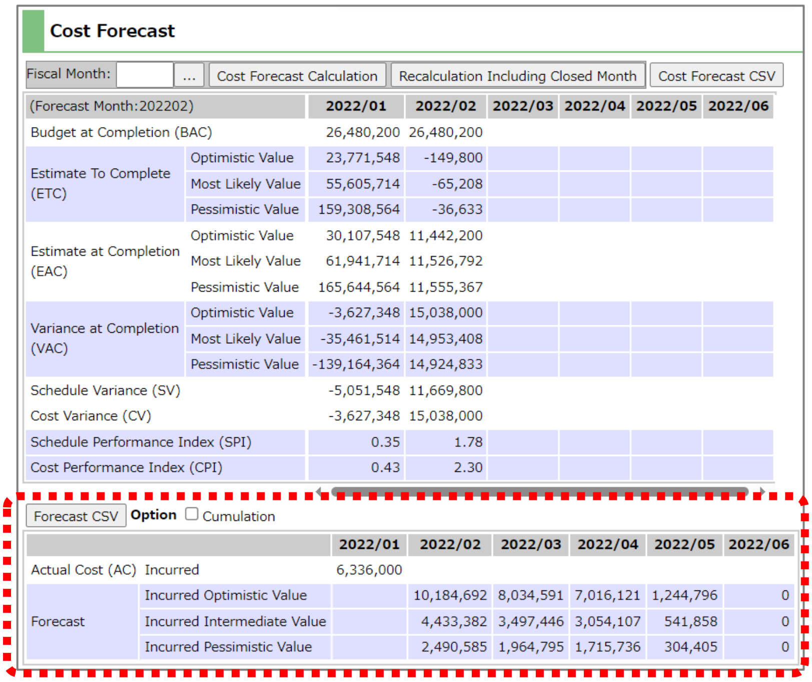
< Project tab: Project Detail screen >



2-3-2. Added forecast calculation function

Previously, there were two types of budgets, Budgeted Cost of Work Estimated and Budgeted Cost of Work Scheduled. We have now added a Forecast calculation function that allows you to calculate monthly cost forecasts from the cost forecast year/month to the project finish year/month based on the latest schedule. This allows you to calculate a budget while maintaining the schedule performance and cost performance of the latest schedule.

< Profit tab: Cost Forecast screen >



Cost Forecast

Fiscal Month: ... | Cost Forecast Calculation | Recalculation Including Closed Month | Cost Forecast CSV

(Forecast Month:202202)		2022/01	2022/02	2022/03	2022/04	2022/05	2022/06
Budget at Completion (BAC)		26,480,200	26,480,200				
Estimate To Complete (ETC)	Optimistic Value	23,771,548	-149,800				
	Most Likely Value	55,605,714	-65,208				
	Pessimistic Value	159,308,564	-36,633				
Estimate at Completion (EAC)	Optimistic Value	30,107,548	11,442,200				
	Most Likely Value	61,941,714	11,526,792				
	Pessimistic Value	165,644,564	11,555,367				
Variance at Completion (VAC)	Optimistic Value	-3,627,348	15,038,000				
	Most Likely Value	-35,461,514	14,953,408				
	Pessimistic Value	-139,164,364	14,924,833				
Schedule Variance (SV)		-5,051,548	11,669,800				
Cost Variance (CV)		-3,627,348	15,038,000				
Schedule Performance Index (SPI)		0.35	1.78				
Cost Performance Index (CPI)		0.43	2.30				

Forecast CSV **Option** ☐ Cumulation

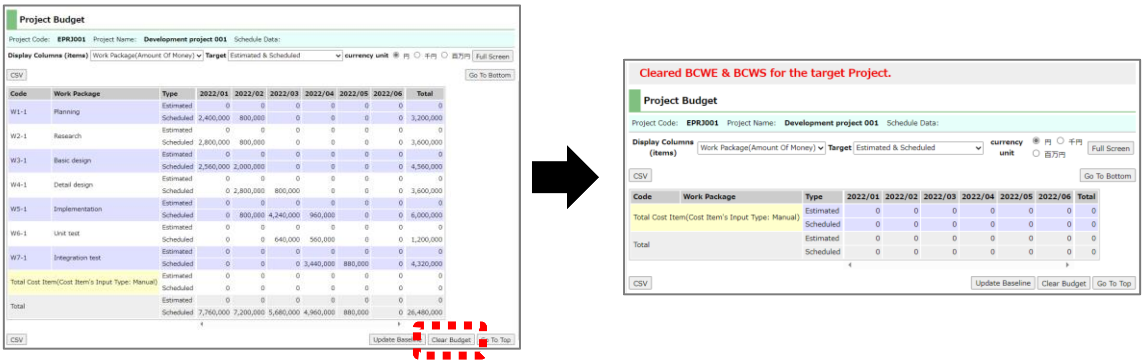
		2022/01	2022/02	2022/03	2022/04	2022/05	2022/06
Actual Cost (AC)	Incurred	6,336,000					
Forecast	Incurred Optimistic Value		10,184,692	8,034,591	7,016,121	1,244,796	0
	Incurred Intermediate Value		4,433,382	3,497,446	3,054,107	541,858	0
	Incurred Pessimistic Value		2,490,585	1,964,795	1,715,736	304,405	0

2-3-3. Added Budget clearing function for Budgeted Cost of Work Estimated / Budgeted Cost of Work Scheduled

When a registered project’s start or finish year/month is changed before the project begins, and if the Budgeted Cost of Work Estimated or Budgeted Cost of Work Scheduled has already been aggregated for the period outside the new range, several operations are required to be done, such as updating the bar chart and recalculating the budget. To simplify this process, we have added a budget clear function allowing you to smoothly revise the period before the project begins.

- * The budget clear function can only be performed by users who have both project budget update authority and budget clear authority in the project’s permission settings.
- * Once the actual costs, such as Man-hours, Expenses, or Costs has been entered after the project has started, the “Clear Budget” function cannot be executed, even by authorized users.

< Budget tab: Project Budget screen >



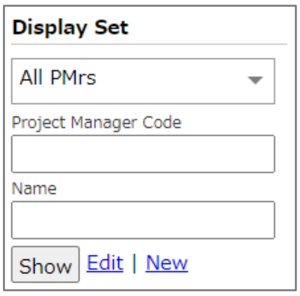
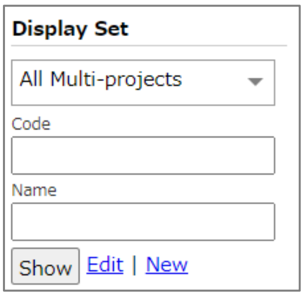
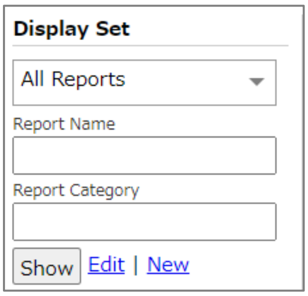
2-4. Enhanced Program management related fields

In addition to the Extra Fields (30 items each for string, numeric, and date), we have introduced “Additional Fields”. This feature allows you to fully customize the item names, field IDs, data types, input areas, and the number of characters.
The “Additional Fields” resolves the previous limitation in PREGARE where not all program information could be registered due to the restricted number of “Extra Fields”, since there is no limit to the number of “Additional Fields”. You can assign a custom ID to each field items, allowing it to match the ID used in other systems. For details on settings, please refer to “PREGARE Screen Customization Guide” included to the product.

2-5. Improved usability of Display Set

2-5-1. Improved filtering functions for PMr List, Multi-project List, and Report List

In addition to Display Set, you can now filter directly with code and name on PMr List and Multi-Project List screen. For the Report List, you can filter by report name and report type aside of Display Set. This enhancement simplifies the process of extracting the data you need.

PMr List screen	Multi-project List screen	Report List screen
		

2-5-2. Improved searching criteria

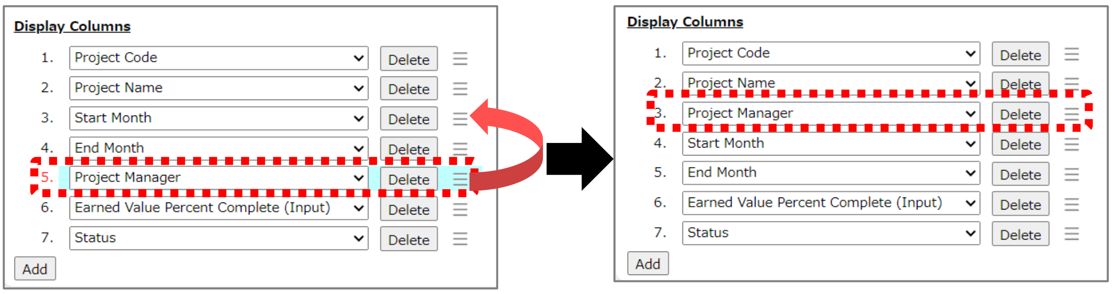
In the search criteria, following options are now available:

- Program additional field
- Project additional field

2-5-3. Improved usability when sorting display items in Display Set

You can now smoothly rearrange the order of Display Items within a Display Set using drag-and-drop. This eliminates the need to delete items when modifying their order of Display Items, streamlining the process and saving your time.

< Display Set screen >



2-6. “Resource Histogram Group” function of ACTY'S became available

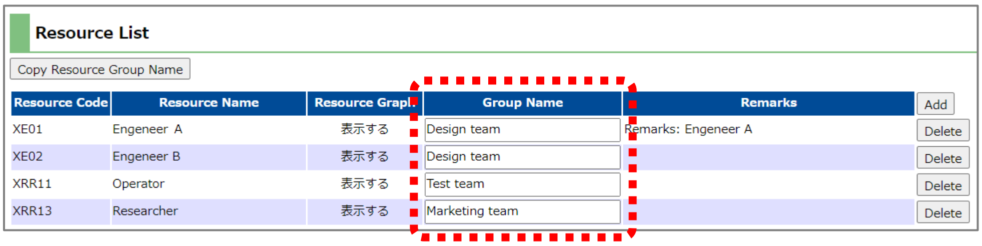
In previous versions, when you upload a bar chart to PREGARE that uses “Resource Histogram Group” feature, a new function introduced in WebI ACTY'S Orario (hereafter referred to as ACTY'S) 12, the Resource Histogram Group information will be cleared. It has been fixed so that you can use “Resource Histogram Group” feature alongside with PREGARE.

(1) Added “Histogram Group Name” item to project resources of each project

You can now assign Histogram Group to project resources registered in each project schedule. This can be done via the Resource List on the project edit screen or the project resource edit screen. Additionally, for bulk registration of Histogram Groups across projects, please use the newly available “Project Resource CSV Upload” feature in Project List.

Furthermore, you can use the “Copy Resource Group Name” button to set Histogram Group names to match Resource Group names. After copying, you can freely edit the group name as needed.

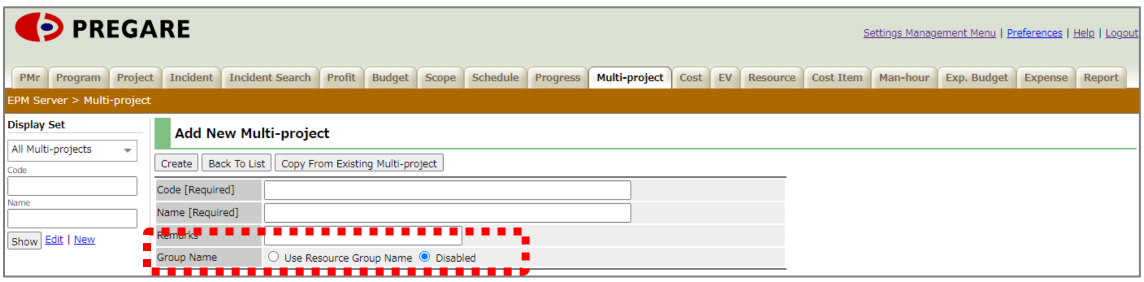
< Project tab: Edit Project screen >



(2) Added “Histogram Group Name” setting item to Multi-project

When setting Histogram Group Name for multi-project, you can select whether to use the Resource Group Name as the Histogram Group Name on Multi-project tab.

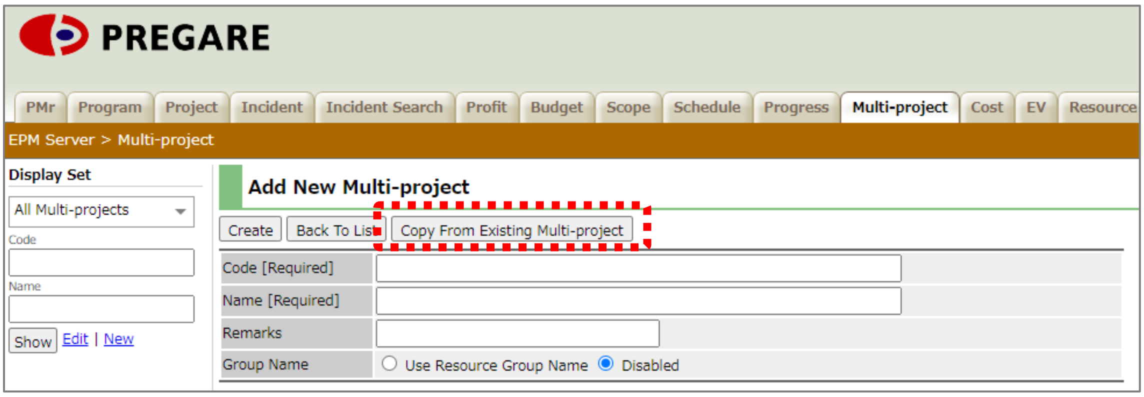
< Multi-project tab: Add New Multi-project screen>



2-7. Improvements when registering new Multi-project

During the creation process of a new multi-project, “Copy From Existing Multi-project” button is now available to copy the code, name, Histogram Group Name settings, list of target projects, and permission settings from an existing multi-project.

< Multi-project tab: Add New Multi-project screen>



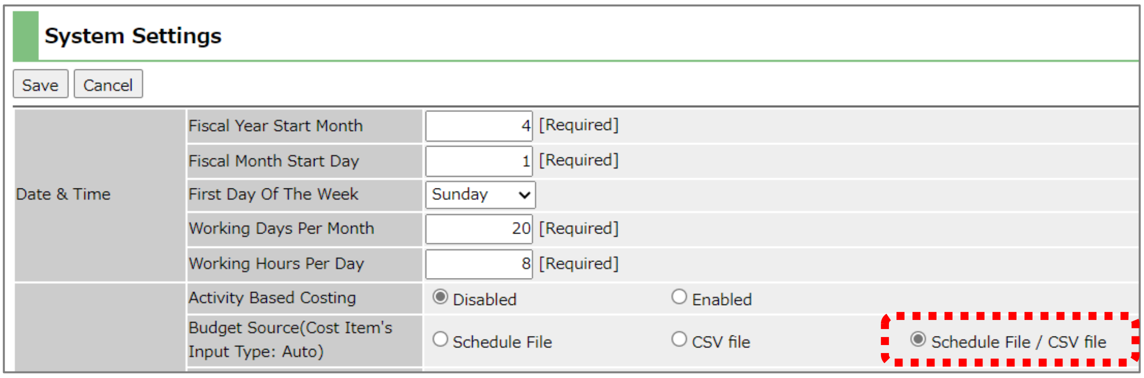
2-8. Improved aggregate Cost Item budget input method

Previously, you had to choose between aggregating from “Schedule File” or registering from a “CSV file” to enter aggregated cost budgets. Now, both methods are available depending on the roles of project members and operational approach of PREGARE.

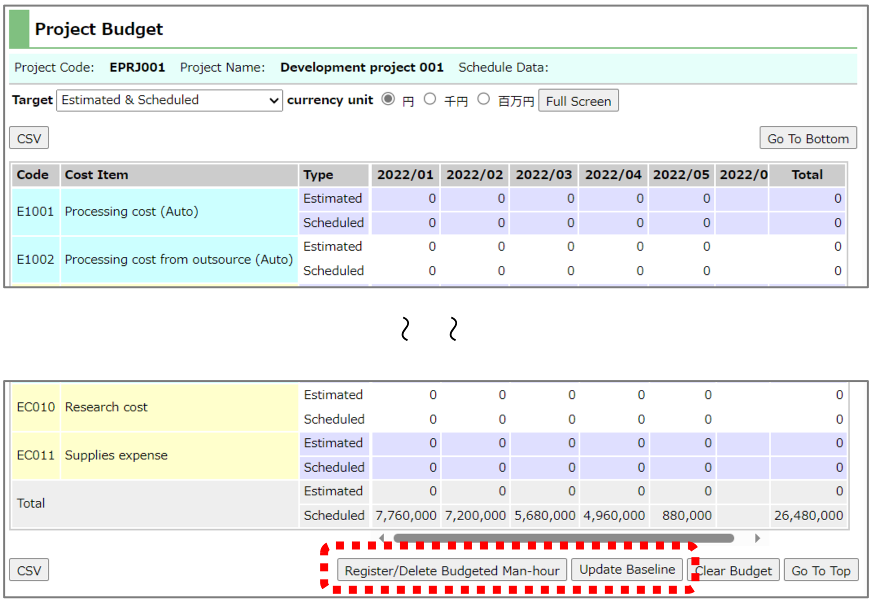
* When using ABC function, budget must be aggregated from the schedule file, thus the “Schedule File/CSV file” option will be disabled.

< Settings Management Menu: System Settings screen >

E.g. Display target: Budgeted Cost of Work Estimated + Budgeted Cost of Work Scheduled



< Budget tab: Project Budget screen >

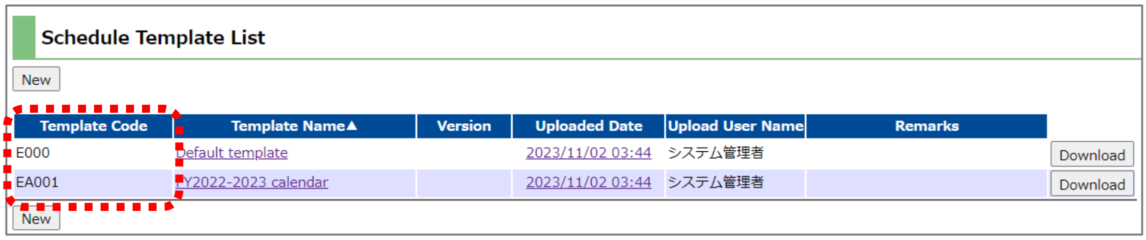


2-9. Added Template Code to Schedule Template / Print Pattern Template

Template Codes is now available for Schedule Template and Print Pattern Template. This helps you find the templates you need easier by sorting.

* Template Code is required during the template registration. Also, template code must be unique.
* When upgrading from PREGARE14, Template Code will be automatically assigned with numbers. You can freely edit them after automatic assignment.

< Settings Management Menu: Schedule Template List screen >



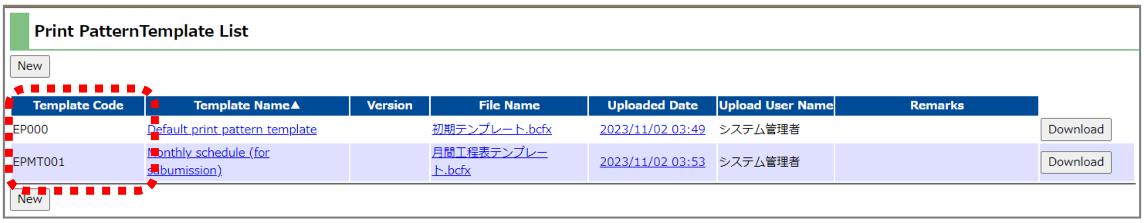
Schedule Template List

New

Template Code	Template Name▲	Version	Uploaded Date	Upload User Name	Remarks	
E000	Default template		2023/11/02 03:44	システム管理者		Download
EA001	FY2022-2023 calendar		2023/11/02 03:44	システム管理者		Download

New

< Settings Management Menu: Print Pattern Template List screen >



Print PatternTemplate List

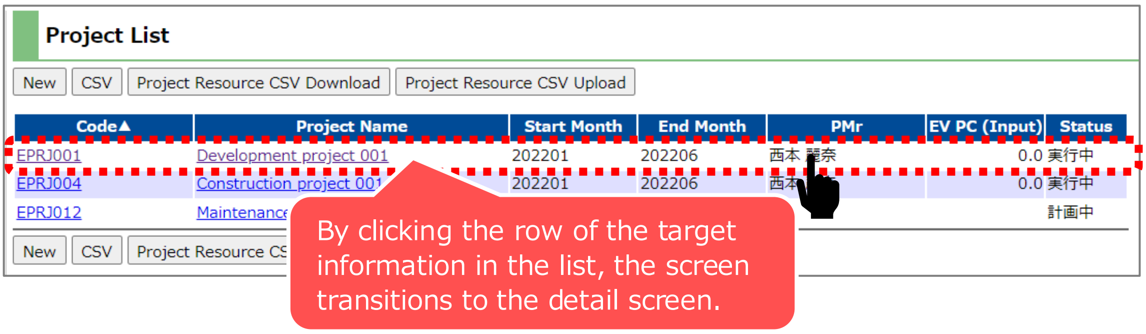
New

Template Code	Template Name▲	Version	File Name	Uploaded Date	Upload User Name	Remarks	
EP000	Default print pattern template		初期テンプレート.bcfx	2023/11/02 03:49	システム管理者		Download
EPMT001	Monthly schedule (for subumission)		月間工程表テンプレート.bcfx	2023/11/02 03:53	システム管理者		Download

New

2-10. Improved List screen usability

Previously, you had to click on the code or name to access the detail view from the list view. This has now been improved so that you can click anywhere on the target row to navigate to the detail view.



2-11. Other improvements

- Fixed the issue where the report name was lost when using the Back button to return from the New Report 2 screen to the New Report 1 screen and from the Edit Report 2 screen to Edit Report 1 screen of the Schedule Report.
- Fixed the issue where the budgeted man-hours did not display on the man-hour input screen unless man-hours were registered on the Progress and Man-hour Input screen.
- Fixed the issue where an error occurred during Update Planned Budget process or Update Baseline process when both an enabled and a disabled Work Category registered and sharing the same name.
- Fixed the issue where the program code and program name displayed in the project view were not set as links.
- Fixed the issue where an error occurred if a project was locked after the Add New Incident screen was opened.
- Fixed the issue where occasionally users could not return to the User List after navigating from User Management screen to Edit User screen.
- Fixed the issue where an error occurred when the Monthly Man-hour List was executed with “System administrator (Admin)” specified as project filtering criteria.
- Fixed the issue where the Role List was not displayed after pressing the cancel button again on the Edit Role screen following a permission change.

3. Compatibility with PREGARE14

Data created with PREGARE14 is accessible and editable with PREGARE15.

4. Linked applications

PREGARE15 can be linked with the following applications:

- ACTY'S 14 or later
- Planow 6.3 or later

5. How to avoid known issues

In PREGARE15, when creating a list report on Report tab, there is a possibility that unspecified subtotal rows may be displayed in the report under certain operations. The workaround is as follows:

< Workaround >

1. Open the edit screen of the report that displays the subtotal rows.
2. On the Edit Report 1 screen, select “Summary” in the “Report Type” item. Click the “Next” button until “Grouping Columns” item appears.
3. Clear the item that has been selected in “Grouping Columns” item and click “Save And Run” button.
4. Click “Edit Definition” button, and select “Tabular” for Report Type on the Edit Report 1 screen, then click “Save And Run” button.

If you encounter this issue, please follow the < Workaround > above or contact our Product Support. We apologize for any inconvenience this may cause and appreciate your understanding.

6. Contact us

If you would like to upgrade to PREGARE15, please contact our Product Support as shown below.

- ◆ **Product Support**

  E-mail: pmsupport@webi.co.jp

  Tel: +81-3-3570-2392

If you encounter any issue or have questions while using our product, please consult the relevent section in the manual or review the public support information. For additional assistance, User Support is available via e-mail or telephone under a separate maintenance service contract.

- ◆ **Public Support Information**

  Please refer to the support page of our website.

  ◎ Web I Support Service

  URL: https://www.webi.co.jp/support/

- ◆ **Contact information exclusive for customers with service contract**

  If you have any questions, please contact the following User Support.

  ◎ Product Support

  E-mail: pmsupport@webi.co.jp

  Tel: +81-3-3570-2392