

More4apps

Functional Impact Document

Project Wizard

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14. Release 9.5.95 – 30/10/2023

Whilst we at More4apps have tried to maintain the same look and user interaction, some functionality has been modified due to bug fixes and enhancements to the code. You can still use your current template worksheets in the new version, provided they were created in version 9.4.66 which included the new columns in the Planning Resources section. Added new columns for the Customers section in this release.

For information on the changes included in this release, please see below:

14.1 Added 'New Key Member' and 'New Key Member ID' Columns

Version: 9.5.89

Date: 04/08/2023

Should you enter a Role End Date and designate a New Key Member, the Wizard will automatically insert an additional step. This step involves ending the tenure of the previous Key Member and setting the new start date as the day following the end-date by default. See example below:

UPLOAD RESULTS		PROJECT HEADER	KEY MEMBERS						
Upload Status	Upload Error	Project Number	Role	Key Member	Key Member ID	Role Start Date	Role End Date	New Key Member	New Key Member ID
Updated		WT BULK 33520	Developer	Smith, Alex	1377	13/07/2018			
			Project Manager	Cochran, Mr. Bob	4385	13/07/2018	13/08/2018	Marlin, Ms. Amy	53
		WT BULK 33520	Developer	Smith, Alex	1377	13/07/2018			
			Project Manager	Cochran, Mr. Bob	4385	13/07/2018	13/08/2018		
			Project Manager	Marlin, Ms. Amy	53	14/08/2018			

14.2 Digital Signatures now required

In efforts to keep our products as secure as possible we've recently updated our Digital Signatures. This Wizard is now more secure for you and provides better visibility for tracking and promptly fixing issues related to broken signatures.

Moving forward, when you update your EBS Wizard, a More4apps digital signature will be automatically applied. This means that users may receive a message when copying worksheets from older versions. For more information on how to resolve this, check out the Security section of the [User Guide](#).

13. Release 9.5.80 – 23/02/2023

Whilst we at More4apps have tried to maintain the same look and user interaction, some functionality has been modified due to bug fixes and enhancements to the code. You can still use your current template worksheets in the new version, provided they were created in version 9.4.66 which included the new columns in the Planning Resources section. Added new columns for the Customers section in this release.

For information on the changes included in this release, please see below:

13.1 Added 'Invoice Currency Rate Date' and 'Invoice Currency Exchange Rate' columns to Customers section

Version: 9.5.79

Date: 23/01/2023

Added 'Invoice Currency Rate Date' and 'Invoice Currency Exchange Rate' columns to Customers section:

Invoice Currency				
Allow User Rate Type	Invoice Currency Code	Invoice Currency Rate Type	Invoice Currency Rate Date	Invoice Currency Exchange Rate

12. Release 9.5.69 – 05/10/2022

Whilst we at More4apps have tried to maintain the same look and user interaction, some functionality has been modified due to bug fixes and enhancements to the code. You can still use your current template worksheets in the new version, provided they were created in version 9.4.66 which included the new columns in the Planning Resources section. Added new columns for the Customers section in this release.

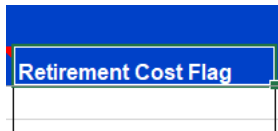
For information on the changes included in this release, please see below:

12.1 Column 'Retirement Cost Flag' added

Version: 9.5.62

Date: 28/06/2022

Added column 'Retirement Cost Flag' to Tasks section:



It can be set to 'Y' or 'N'.

11. Release 9.5.59 – 02/06/2022

Whilst we at More4apps have tried to maintain the same look and user interaction, some functionality has been modified due to bug fixes and enhancements to the code. You can still use your current template worksheets in the new version, provided they were created in version 9.4.66 which included the new columns in the Planning Resources section. Added new columns for the Customers section in this release.

For information on the changes included in this release, please see below:

11.1 Added New Columns and a Name Change to an existing Column

Version: 9.5.55

Date: 27/4/2022

Added the following columns to the Customers section:

- Bill Another Project
- Allow User Rate Type
- Invoice Currency Rate Type
- Receiver Project Name
- Receiver Task

Renamed 'Customer Default Flag' column to 'Default Top Task Customer'.

11.2 Added New Profile Option

Version: 9.5.54

Date: 21/4/2022

Added profile option 'More4apps: PW Remove lock from Workplan before Publishing' - Set this profile option to 'Yes' at Site or Responsibility level. It may be necessary to unlock the draft version prior to publishing it if it is locked by another user. The profile option enables this feature in the tool.

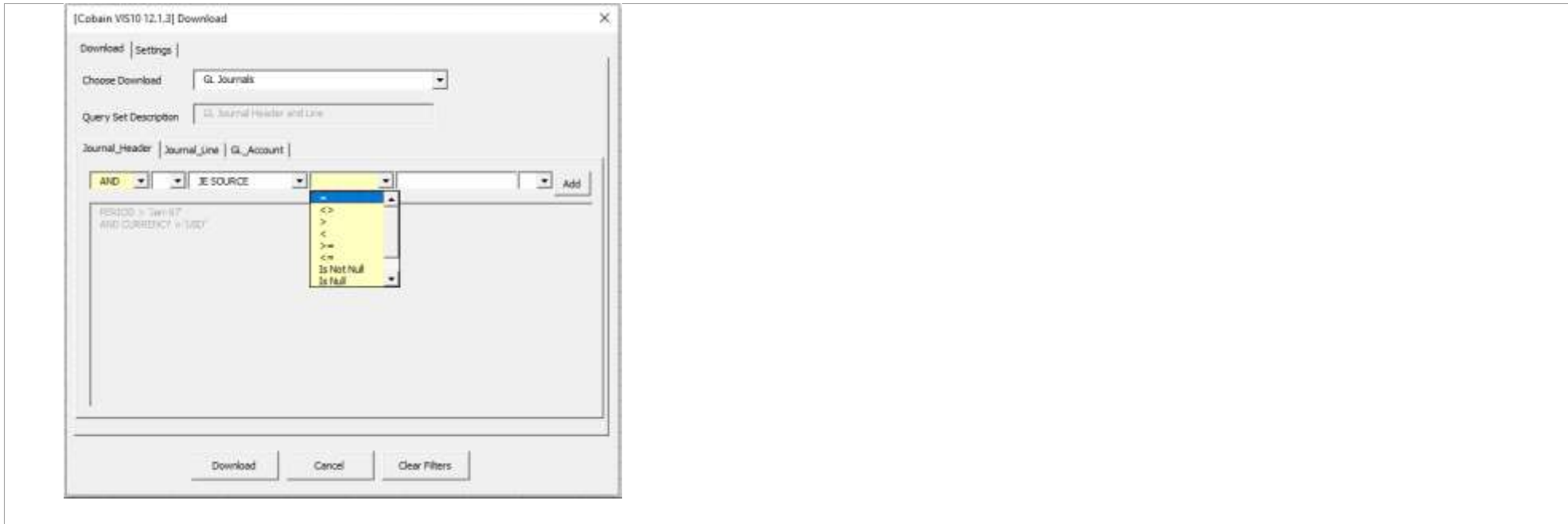
11.3 Custom Query SQL Injection update

Version: 9.5.53

Date: 22/02/2022

Custom Query functionality will no longer allow written SQL criteria in the Download form. Download criteria must now be added using the provided controls.

Example:



10. Release 9.5.50 – 27/01/2022

Whilst we at More4apps have tried to maintain the same look and user interaction, some functionality has been modified due to bug fixes and enhancements to the code. You can still use your current template worksheets in the new version, provided they were created in version 9.4.66 which included the new columns in the Planning Resources section.

For information on the changes included in this release, please see below:

10.1 Added new information column Total Asset Cost to Assets Section

Version: 9.5.43

Date: 13/11/2021

Added new information column 'Total Asset Cost' to the Assets section.

Total Asset Cost

10.2 Workplan and Task DFFs split into separate sets of columns

Version: 9.5.41

Date: 24/10/2021

Both Workplan and Task DFFs can now be uploaded at the same time using the Direct Task Loader modes.

Task DFF Context	Task Attribute1	Task Attribute10	Workplan DFF Context	Workplan Attribute1	Workplan Attribute15

10.3 New Profile Option 'More4apps: PW Prevent DPIS in prior years on Asset creation' added

Version: 9.5.40

Date: 11/10/2021

Set the newly created profile option 'More4apps: PW Prevent DPIS in prior years on Asset creation' to 'Yes' at the desired level(s) to prevent Project Assets being created where the DPIS is prior to the start of the current fiscal year.

9. Release 9.5.30 – 14/05/2021



Whilst we at More4apps have tried to maintain the same look and user interaction, some functionality has been modified due to bug fixes and enhancements to the code. You can still use your current template worksheets in the new version, provided they were created in version 9.4.66 which included the new columns in the Planning Resources section.
There are no functional changes in this version.

8. Release 9.5.26 – 12/04/2021

Whilst we at More4apps have tried to maintain the same look and user interaction, some functionality has been modified. You can still use your current template worksheets in the new version, provided they were created in version 9.4.66 which included the new columns in the Planning Resources section.

Major performance enhancements are applied to the following sections:

- Assets & Assignments
- Tasks

7. Release 9.4.66 – 14/08/2020

This release includes various enhancements/changes. Along with these, we have added additional columns for the Planning Resources section.

Whilst we at More4apps have tried to maintain the same look and user interaction, some functionality has been modified. In this version, we have added new columns in the Planning Resources section so whilst you **can** use your previous template/worksheets in this version, we recommend that your templates are updated to incorporate the new columns.

For information on the changes included in this release, please see below:

7.1 Task Location LOV on Task Form

Version: 9.4.55

Date: 16/6/2020

Task Location field has been added to the Tasks form where a location can be selected from a dropdown list.

Tasks

Main

Schedules

Cross Charge

Top Task Customer

Other

Currency

Parent Task Number

Task Number

Task Name

Long Name

Description

Task Organization

Service Type Code

Work Type Code

Task Type Code

Task Location

Start Date

Completion Date

Assigned Asset

Add

Delete

Accept

Cancel

1.0

Design

Design

Design

Services-South

Contract Administration

Federal Customer-billable

Baumbore 45

Baumbore 45

Baumbore 45

Mexikorig 2

Ngoyen 370

1/08/2020

1/08/2025

7.2 Improvement for the Assets Section

Version: 9.4.52

Date: 10/6/2020

In this version, the Assets section has been worked on extensively to improve the performance when an upload or a download is carried out for Assets. Also, a few bugs have been fixed for the Assets section.

7.3 Support Added for the Asset ID column to allow changes to existing Asset Names

Version: 9.4.46

Date: 12/5/2020

Support is added for the column **Asset ID** in the Assets section to allow changes to the Asset Name. To use this functionality, manually add a new column in the Assets section and label it as **Asset ID**, as shown below. When the Asset details are downloaded, Asset IDs for the Assets will get downloaded too.

Note: Asset attributes cannot be modified after capitalization.

ASSETS												
Assignment	Asset Status	Asset Error	Asset ID	Asset Name	Asset Number	Asset Type	Retirement Target	Asset Key	Asset Description	Asset Category	Asset Book	Location
			83778	Wai 10005		As-Built			Wai 10005	BUILDING-OFF	SVCS COR	New York
			83779	Wai 10006		As-Built			Wai 10006	BUILDING-OFF	SVCS COR	New York
			83780	Wai 10007		As-Built			Wai 10007	BUILDING-OFF	SVCS COR	New York

7.4 Asset Add/Update/Delete button removed from Assets form

Version: 9.4.46

Date: 12/5/2020

The Add/Update/Delete buttons have been removed from the Assets form to eliminate duplicate functionality of what is already available on the Project Wizard ribbon for Assets.

7.5 Additional Columns added to Planning Resource section

Version: 9.4.38

Date: 15/4/2020

The following read-only columns are now available for the Planning Resources section:

- Resource
- Resource Start Date
- Resource Finish Date
- Quantity: Planning Quantity
- Quantity: Actual Quantity
- Quantity: ETC Quantity
- Quantity: UOM
- Raw Cost: Planning Raw Cost
- Raw Cost: Planning Burdened Cost
- Raw Cost: Raw Cost Rate
- Raw Cost: Burdened Cost Rate
- Project Currency: Actual Raw Cost
- Project Currency: ETC Raw Cost
- Project Currency: Avg Raw Cost Rate
- Schedule: Scheduled Start Date
- Schedule: Scheduled Finish Date

When you want planning resources to be downloaded, select **Workplan** in the dropdown list **Financial Workplan** available for Wizard Mode **Tasks**. If you do not select this option, planning resources will not be downloaded for workplan-enabled Projects.

6. Release 9.4.36 – 05/03/2020

This release includes various enhancements/changes. Along with these, we have included a new color scheme for More4apps Wizards.

Whilst we at More4apps have tried to maintain the same look and user interaction, some functionality has been modified. You can still use your current template worksheets in the new version, provided they were created in version 9.3.06 or later. We have implemented a new color scheme in this version of the Wizard so whilst you **can** use your previous template/worksheets in this version, we recommend that your templates are updated to incorporate the new color scheme.

For information on the changes included in this release, please see below:

6.1 Added Resource Format filter to Planning Resources Form

Version: 9.4.31

Date: 10/02/2020

Resource Format can be selected when a planning resource is added to a project. A planning resource list is a combination of planning resource formats and planning resources.

Project Wizard							
PROJECT HEADER		TASKS	RESOURCE STATUS	PLANNING RESOURCES			
Project Number	Task Number	Resource Status	Resource Error	Resource	Resource Start Date	Resource Finish Date	Planning Quantity
Zebra Building 280420	1.0			Amy Marlin, Pro	30/01/2013	28/04/2015	333
				Anne Hamilton, A	30/01/2013	28/04/2015	222
				Emily Heather, A	30/01/2013	28/04/2015	332
	1.1						
	1.1.1						
	1.1.2						
	1.2						
	2.0						
	3.0						
	9.0						

Planning Resources

Please enter search criteria. Use % to return all Resources.

Resource Class:

Resource Format:

Resource:

People
Financial Category - Team Role
Named Person - Financial Category
Equipment
Material Items
Financial Elements
Financial Category

Cancel

6.2 Added New Color Scheme

Version: 9.4.30

Date: 05/01/2020

New More4apps brand applied. This will have no functional impact on users and is purely a cosmetic update.

Existing templates with previous styles will work with this version, note however, the colors may change in these sheets when invoking Wizard functionality. See below for an example:

Project Wizard							
TEMPLATE	UPLOAD RESULTS		PROJECT HEADER				
Template	Upload Status	Upload Error	Project Number	Project Name	Long Project Name	Project Description	Project Organization
T, WT Template			WT 21012019	WT 21012019	WT 21012019	WT 21012019	Information Services

6.3 Added Task Currency Details

Version: 9.4.19

Date: 01/10/2019

Added six new columns on the Task sheet, modified the 'Currency' tab in the All Columns sheet and added a new tab 'Currency' to the Task form.

Task Currency					
Task Project Functional Currency	Task Project Functional Rate Type	Task Project Functional Rate Date	Task Project Currency	Task Project Rate Type	Task Project Rate Date
USD			USD		
USD			USD		
USD			USD		

The following values can be uploaded to Oracle Project Tasks:

- Project Functional Rate Type
- Project Functional Rate Date
- Project Rate Type
- Project Rate Date

The following values can be downloaded for Oracle Project Tasks:

- Project Functional Currency
- Project Functional Rate Type
- Project Functional Rate Date
- Project Currency

- Project Rate Type
- Project Rate Date

New column names for Tasks – Task Currency:

- Task Project Functional Currency
- Task Project Functional Rate Type
- Task Project Functional Rate Date
- Task Project Currency
- Task Project Rate Type
- Task Project Rate Date

Tasks form:

Tasks

Main Schedules Cross Charge Top Task Customer Other **Currency**

Conversion Attributes to Project Functional Currency

Currency USD

Rate Type

Rate Date

Conversion Attributes to Project Currency

Currency USD

Rate Type

Rate Date

6.4 Change of Name from 'Include Actions' to 'Include Deliverable Actions' on the Download Form

Version: 9.4.16

Date: 19/08/2019

Change of checkbox name from 'Include Actions' to 'Include Deliverable Actions' on the Download Projects form:

Download Projects

Main
Task Filter
Transaction Controls Filter

Project
Zebra Building 28042015
Zebra Building 28042015

Project Number From
To
Project Number List

Start Date Range
To

Source Template
Organization

Project Type
Customer

Classification

Include End-Dated Class Codes
☒
☐ Only include this Class Category / Classification

Role / Key Member
add

Include End-Dated Key Members
☐
☐ Only include this Role / Key Member

Project Status

Project Search
like

Project Sort Order
Project Number

Task Sort Order
Workplan Display Order
WBS Status
Working

☒ Include Classifications
☒ Include Program Links
☒ Include Billing Assignments

☒ Include Key Members
☒ Include Assets
☒ Include Deliverables

☒ Include Customers
☒ Include Asset Assignments
☒ Include Deliverable Assignments

☒ Include Tasks (Financial)
☒ Include Planning Resources
☒ Include Deliverable Actions

☒ Include Transaction Controls
☒ Include Billing Overrides
☒ Include Cost Codes

Clear
Download
Cancel

5. Release 9.3.06 – 16/07/2019

This release includes various enhancements/changes. Along with these, we have included a new color scheme for More4Apps Wizards.

Whilst we at More4Apps have tried to maintain the same look and user interaction, some functionality has been modified. You **can** use your previous template/worksheets in this new version, but you may want to create new ones to utilise the new color scheme.

For information on the changes included in this release, please see below:

5.1 Added New Color Scheme

Version: 9.3.00

Date: 14/06/2019

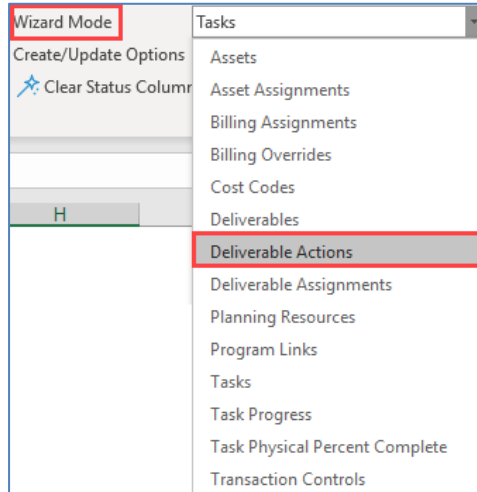
More4Apps has implemented a new color scheme, see below for an example:

TEMPLATE		UPLOAD RESULTS		PROJECT HEADER					
Template		Upload Status	Upload Error	Project Number	Project Name	Long Project Name	Project Description	Project Organization	Distribution Rule
T, Cost Plus				WT Cost Plus 10	WT Cost Plus 10	WT Cost Plus 10	WT Cost Plus 10	Services-West	Work/Work

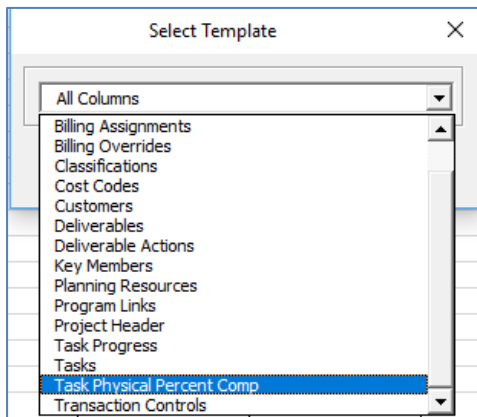
5.2 Changes to Mode Name and Template Sheet Name

Version: 9.2.206

Date: 11/03/2019



Wizard Mode Name change from **Action** to **Deliverable Actions**

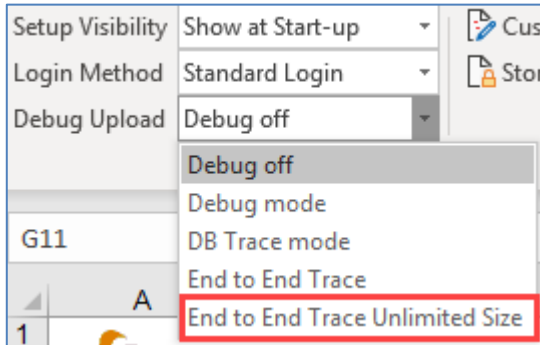


Template Name change from **Fin Percent Complete** to **Task Physical Percent Comp**

4. Release 9.2.205 – 05/03/2019



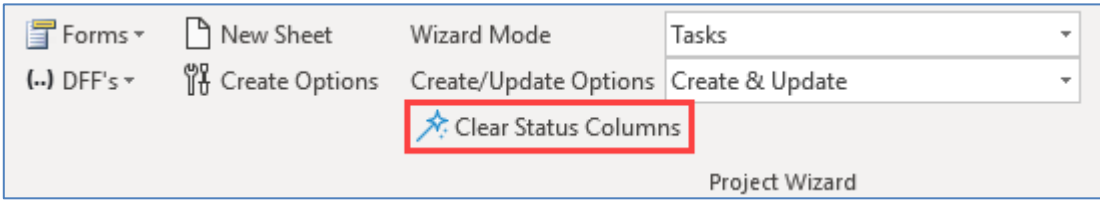
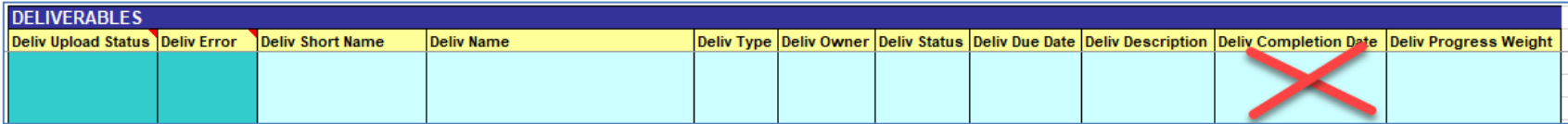
This release includes various enhancements/changes. Along with these, this version has improved performance on uploading multiple assets from the sheet.

Whilst we at More4Apps have tried to maintain the same look and user interaction, some functionality has been modified. One column 'Deliv Completion Date' which is under the Deliverables section has been removed. You may need to modify your current template worksheets to work in this version.

Version	Date	Description
9.2.197	15-01-2019	Added Transaction Control APIs Project Wizard will no longer use More4Apps code to upload Transaction Controls if the customer has the appropriate patch installed on their environment. Delete Transaction Controls are not included in the public API, therefore users still need to set the profile option " to 'Yes' in order to delete Transaction Controls.
9.2.196	18-12-2018	Performance enhancements for Project Asset upload. Assets and Asset Assignments will upload faster in this version.
9.2.194	05-12-2018	New debug mode option 'End to End Trace Unlimited Size' added to Project Wizard – Setup ribbon.  The user will be under instruction from More4Apps Support (used for Support purposes only). The default value is 'Debug off' unless instructed by More4Apps to change.

Version	Date	Description
		<p>End to End Trace Unlimited Size option allows the maximum size of trace files created whilst debugging to become unlimited. This resolves the scenario when trace files are too large that they were being truncated.</p> <p>A message box will be displayed when this option is chosen allowing the user to cancel and not set the trace off:</p> <p style="padding-left: 40px;">“Please only use this under More4Apps advice. A very large trace file may be created. If you are unsure, please use the End to End Trace’ option rather than the ‘End to End Trace Unlimited Size’ option”.</p>
9.2.190	02-11-2018	Mandatory fields on the Deliverables and Deliverable Actions forms are highlighted with a yellow color.


Version	Date	Description
		<div> <div> <div>Deliverables</div> <div> <div>Deliv Short Name</div> <div>Deliv Name</div> <div>Deliv Type</div> <div>Deliv Owner</div> <div>Deliv Status</div> <div>Deliv Due Date</div> <div>Deliv Progress Weight</div> <div>Deliv Description</div> </div> <div> <div>Accept</div> <div>Cancel</div> </div> </div> <div> <div>Deliverable Actions</div> <div> <div>Action Name</div> <div>Action Owner</div> <div>Action Owner Id</div> <div>Action Function</div> <div>Deliv Action Due Date</div> <div>Action Description</div> </div> <div> <div>Accept</div> <div>Cancel</div> </div> </div> </div>
9.2.188	23-10-2018	<p>Updated Project Wizard ribbon</p> <p>Logging and Help buttons that assist with support. Click the Logging button to add an additional debug sheet to the Wizard. Help includes links to user guide and product documentation.</p>

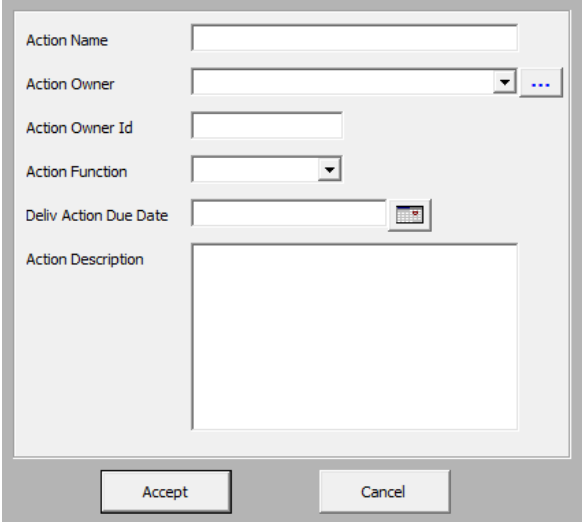
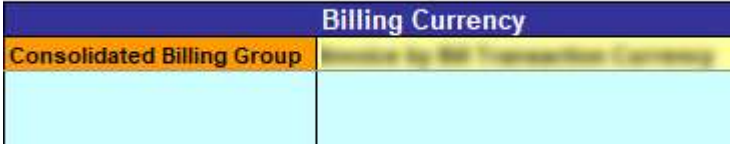
Version	Date	Description
		 Logging  Help
9.2.184	25-09-2018	Function Security Added functional security controls over uploading and downloading projects. Users without the correct function in their responsibility will not have access to view or make changes to projects.
9.2.178	20-09-2018	Updated Project Wizard ribbon Clear Status Columns button to clear previously uploaded status from the Upload Status columns. 
9.2.177	17-09-2018	Removed 'Deliv Completion Date' column from the Wizard as the Oracle API does not upload these values as expected. An investigation into available Deliverable API is required to make this functionality work if there is customer demand. Deliverable status list of values updated to only contain 'Not Started' as other statuses had conditions outside of the scope of the current design. 

3. Release 9.2.174.1 – 14/09/2018

This release includes various enhancements/changes. Along with these, this version has improved performance on downloading multiple projects to the sheet.

Whilst we at More4Apps have tried to maintain the same look and user interaction, some functionality has been modified. Two new columns are added to this version of the Wizard. You may need to modify your current template worksheets in the new version. No changes to the package have been made.

Version	Date	Description
9.2.165	27-08-2018	<p>Added new forms for the following sections:</p> <ul style="list-style-type: none"> Deliverables 

Version	Date	Description
		<ul style="list-style-type: none"> Deliverable Actions 
9.2.159	09-08-2018	<p>New column 'Consolidated Billing Group' added for Oracle EBS 12.2.4. The column color will be orange if the field is not available in the Oracle EBS version the user is using for the Wizard.</p> 
9.2.157	01-08-2018	New column 'Retirement Target Asset' added to All Columns Sheet and Asset and Assignments Sheet.

Version	Date	Description														
		<div><div>ASSETS</div><table><tr><th>Asset Name</th><th>Asset Number</th><th>Asset Type</th><th>Asset Key</th><th>Location</th><th>Asset Book</th><th>Retirement Target Asset</th></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table></div>	Asset Name	Asset Number	Asset Type	Asset Key	Location	Asset Book	Retirement Target Asset							
Asset Name	Asset Number	Asset Type	Asset Key	Location	Asset Book	Retirement Target Asset										

New field 'Retirement Target Asset' added to the Assets Form.

Asset Name

Asset Type

Asset Number

Description

Category

Assigned To

Depreciation Acct

Estimated In Service Date

Actual In Service Date

Manufacturer

Serial Number

Tag Number

Asset Type

Retirement Target Asset

Asset Key

Location

Asset Book

Depreciate

Amortize Acct

Estimated Num of Asset Units

Number of Asset Units

Parent Asset

Estimated Cost

Model Number

Project / Task Assignment

Add Assignment

Delete Assignment

Add Asset

Delete Asset

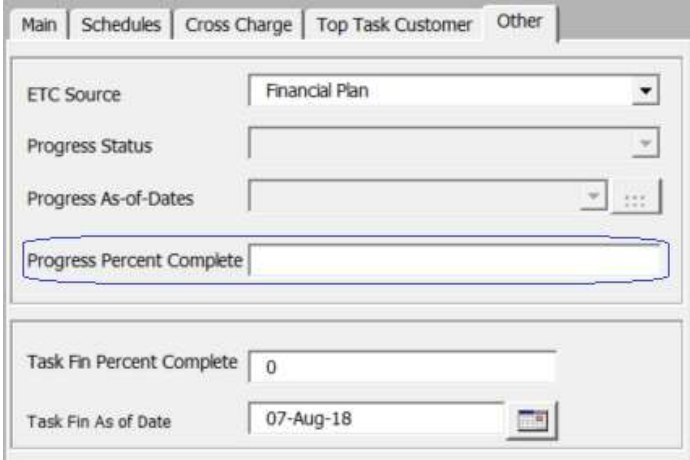
Accept

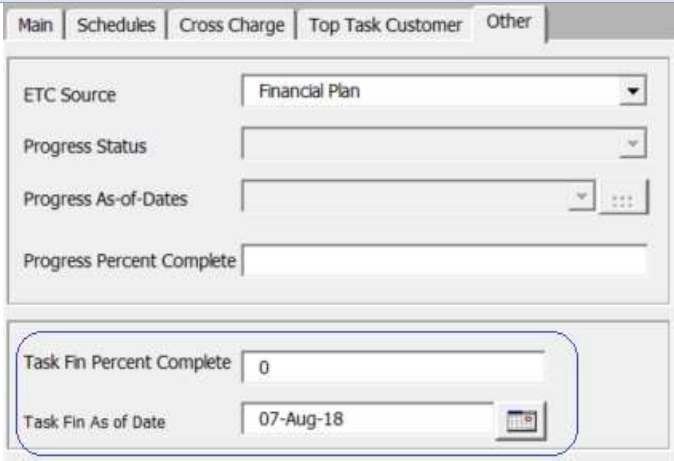
Cancel

2. Release 9.2.150 – 06/04/2018

This release includes various enhancements/changes.

Whilst we at More4Apps have tried to maintain the same look and user interaction, some functionality has been modified. You can still use your current template worksheets in the new version.

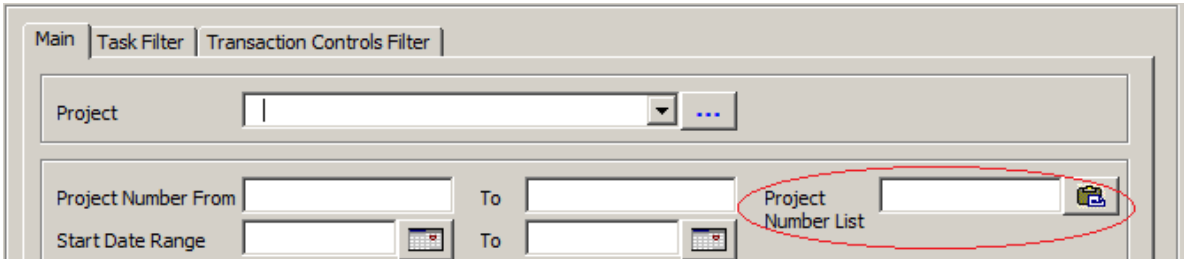
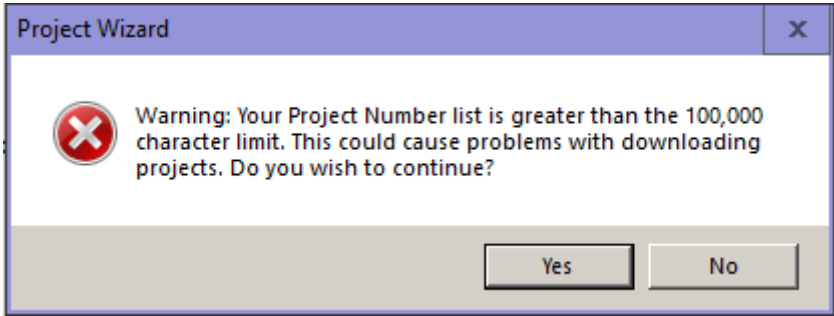
Version	Date	Description
9.2.143	05-03-18	<p>Added 'Progress Percent Complete' field to the Tasks form. While the column already existed in the Wizard, it was not previously available in the user entry form.</p> 
9.2.140	02-03-18	<p>Added 'Task Fin Percent Complete' and 'Task Fin As of Date' fields to Tasks form. While these columns already existed in the Wizard, they were not previously available in the user entry form.</p>

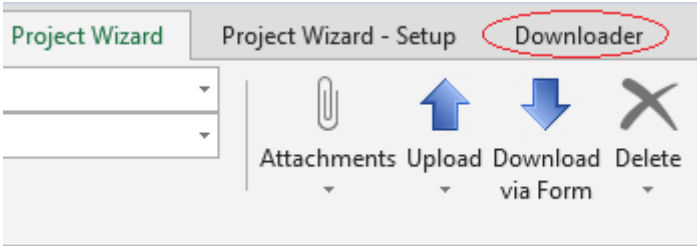
Version	Date	Description
		
9.2.135	19-01-18	The template chosen is now reflected in the worksheet name to make it easier to identify which template each sheet is using. You can still rename the sheet if required.

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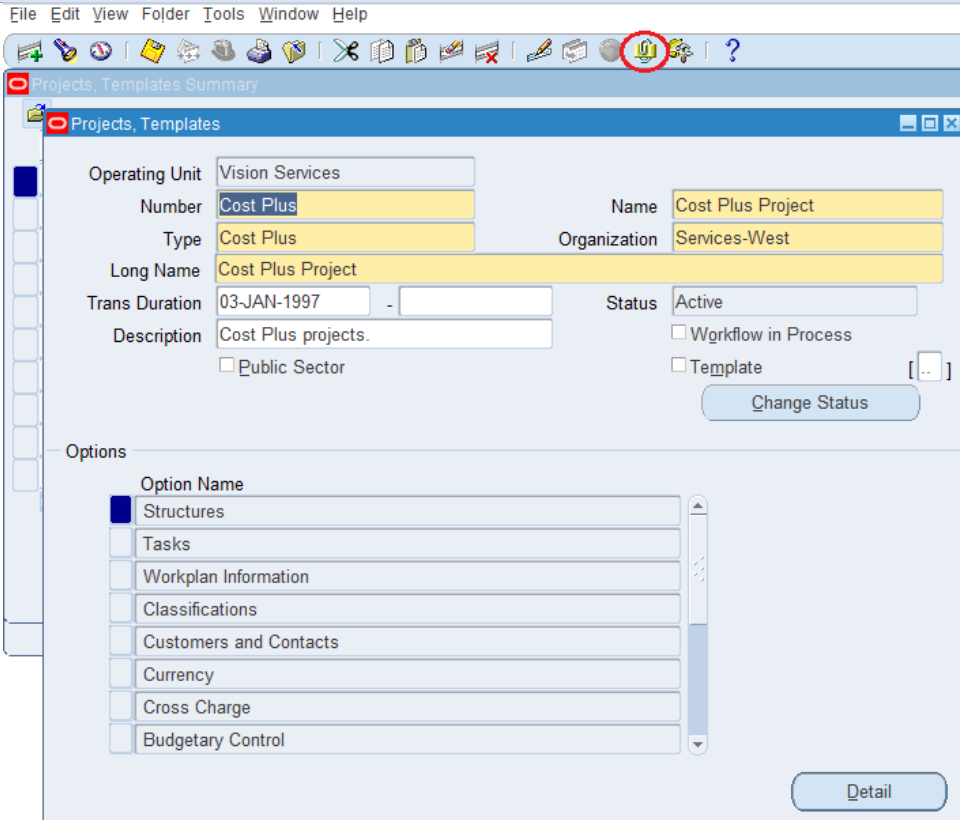
This release includes various enhancements/changes. Along with these, this version has Attachments functionality added to it.

Whilst we at More4Apps have tried to maintain the same look and user interaction, some functionality has been modified. You can still use your current template worksheets in the new version however you will need to add the Attachments section in if you wish to upload Attachments.

Version	Date	Description
9.2.124	08-01-2018	<p>Increased size limit for Project Number CSV download list.</p> <p>The download limit for combined characters in the CSV list was 1000. This has been increased to 20,000 for 11i and 100,000 for R12.</p> <p>If these new limits are exceeded a message will be returned to the user and the number in that message will reflect the limit depending on the instance used (11i or R12).</p>  
9.2.123	03-01-2018	<p>Added UDA Class Category association search based on values on worksheet (when creating new Projects).</p> <p>This used to be a 2-step process – upload the new Project and associated Classifications then a second upload was needed to create the Classification UDA's. The enhancement has been applied in this version and resolves this issue by making it a 1-step process – Classification UDA's are created at the same time as the Classifications.</p>

Version	Date	Description
9.2.103	08-11-2017	<p>Added the new Downloader functionality.</p>  <p>For information on the Downloader Add-In click here for the user documentation.</p>
9.2.94	16-10-2017	<p>Fix to allow UDA form to work with multi-row UDAs. This form is not in the ribbon, it will open once the user has added in their UDA columns and double clicks in the columns.</p> <p>The UDA sample sheet has referred to them but the functionality in the Wizard wasn't there. This has been rectified and you can now upload multi-row UDAs.</p>
9.2.88	03-10-2017	<p>The Wizard now has Attachments functionality. This is at the Project level only at this stage. There is an additional section for it in the Wizard.</p> <p>If you are using an older version worksheet in the new Wizard version you can simply add the Attachment section by creating a New Sheet, selecting the 'All Columns' template, copying the columns then pasting them into your own worksheet.</p> <p>Full details in our User Documentation: Attachments</p>

Version	Date	Description					
		PROJECT HEADER ATTACHMENTS					
		Proj Attach Status	Proj Attach Messages	Proj Attach Sequence	Proj Attach Title	Proj Attach Category	Proj Attach Desc
		<i>Accepted</i>		10		Miscellaneous	Short Text
		<i>Accepted</i>		30		Miscellaneous	Long Text
		<i>Accepted</i>		40		Miscellaneous	Web Page
		<i>Accepted</i>		40		Miscellaneous	File

Version	Date	Description
		
9.2.87	28-9-2017	<p>Added 'Expected Approval Date' column to the Project Header section. This was an enhancement request from a customer.</p> <p>If you are using an older version worksheet in the new Wizard version you can simply add this column by creating a New Sheet, selecting the 'All Columns' template, copying the 'Expected Approval Date' column then pasting it into your own worksheet. Ensure the column has the name 'Expected Approval Date' in Row 9.</p>