



Webforum

New Functions in Version 15.3

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About this document

This document describes the main new functionality in the Webforum 15.3 release. It contains new functionality in all the different Webforum services, i.e. Teamwork, Project and Professional. This means that not all customers have access to all the functionality described here.

If you are interested in getting access to functionality that you currently do not have, please contact Webforum or a Webforum partner.

Overview

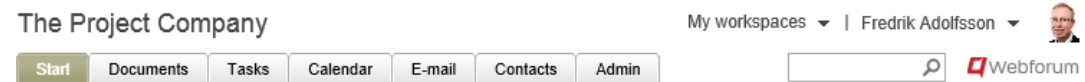
The following functionality is new:

Module/Function	Description of changes
System Header	Redesigned system header with user picture
Start page	Formatted text in the Info widget
Documents	New plugin for Internet Explorer
	Other improvements
Contacts	Redesigned Contacts module with user pictures
Project Management	Project details page design
	Project fields configuration
	Migration of standard fields to custom fields
	Default filter in the project list
	Increased number of analyzable fields
Project Office	Activity description for phases
Issue management	Sums in issues
	Improved export of issues
Risk Management	Risk details improvements
	Parameter for axis definition of Probability and Consequence

System Header

Redesigned system header with user picture

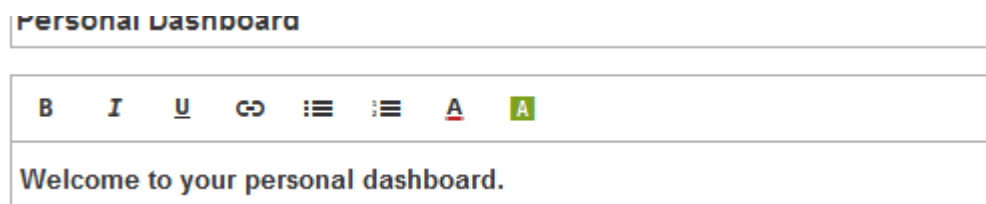
The header displayed at the top of every page in the system has been redesigned. Some menus have been grouped together to reduce clutter. It is now possible for the user to upload a picture that will be displayed in the header and in the redesigned Contacts module. This picture will be added to more places in the system in coming upgrades.



Start page / Dashboard

Formatted text in the Info widget

It is now possible to format the text in the Info widget on the start page with an editor. This means that text can be made bold, italic and underlined, that links can be inserted and that bulleted and numbered lists can be created.



Documents

New plugin for Internet Explorer

A new plugin has been developed for Internet Explorer. It supports the same functionality as today's plugin; edit online and drag and drop. The new plugin will be rolled out to all customers over the coming months. The plugin supports 32 bit IE9, IE10 and IE11 just as the current plugin does. There is also a plugin for Firefox. A version for Chrome will soon be available.

Other improvements


A number of smaller improvements have been made to the document archive:

- It is possible to select locked by and locked date as columns
- Location is added as a column for baskets and sets
- It is possible to search for documents using their filename extension
- A description has been added for document types


Contacts

Redesigned Contacts module with user pictures

The Contacts module has been completely redesigned to be more user friendly. It now shows pictures for all users that have uploaded one in the new header.

First Name ▲	Last Name	E-mail Address
 Fredrik	Adolfsson	✉ fredrik.adolfsson@webforum.com

Contact list



Fredrik Adolfsson

Webforum

✉ fredrik.adolfsson@webforum.com

[Download contact \(vCard\)](#)

Contact detail




Project Management

Project details page design

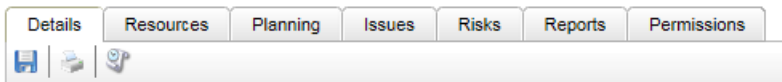
The following changes have been implemented in the project details tab:

- There is a new toolbar
- The tab is separated in two horizontal tabs
 - General: Contains data related to the project
 - Configuration: Contains the setup parameters related to the project
- There is a common block for standard fields and custom fields. The standard fields are displayed first, directly followed by the custom fields.
- Multi line custom fields always start on a new row and are dynamically expandable dependent on the amount of text.

Toolbar

	Save changes to the project
	Print the project
	Open the project history dialog

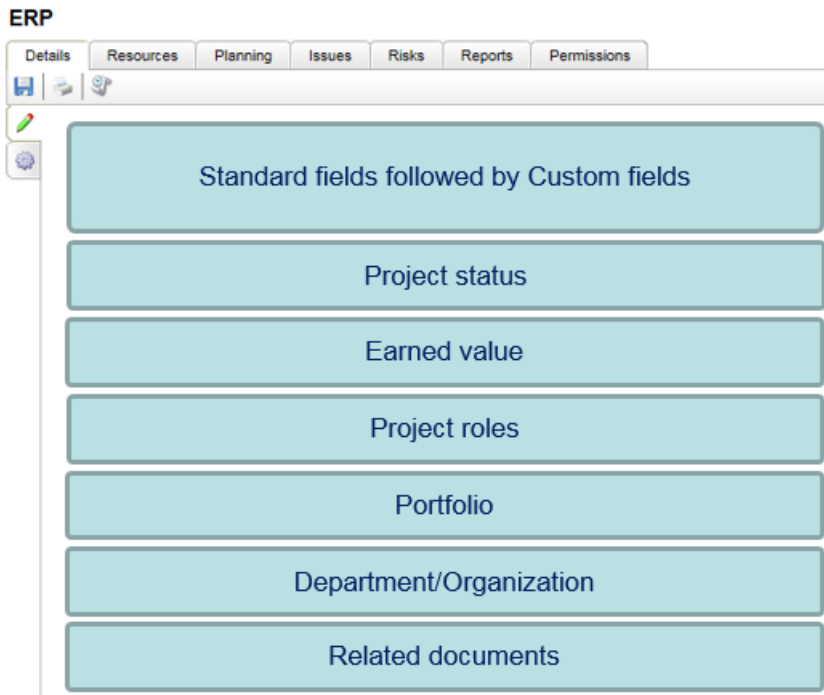
ERP



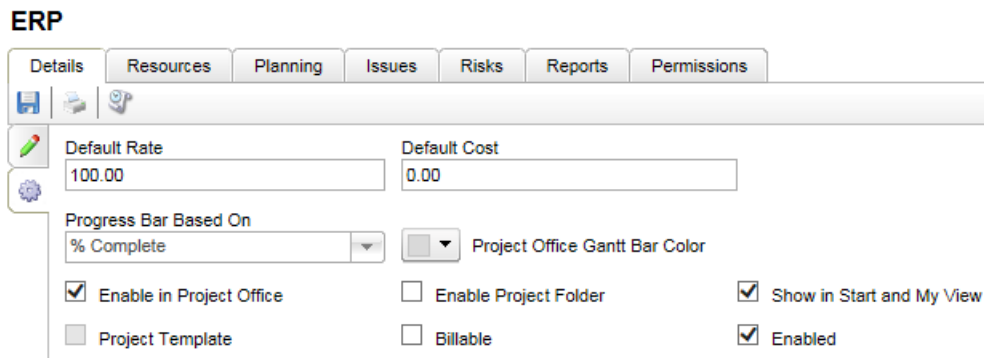
Toolbar in the project details tab

ERP

The project details tab with the two new horizontal tabs



Page structure of the general tab



The configuration tab

ERP

Details Resources Planning Issues Risks Reports Permissions

Project Name* ERP Project number 2004 Status In Progress

Project start date* 14/08/2015 Project End Date 31/07/2013 Currency* EUR Euro

Description

xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx
 xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx
 xxxx xxxx
 xxxx xxxx xxxx

Project Categories Standard Project Organization Finance Priority * 3

Text multiple

xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx
 xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx
 xxxx xxxx
 xxxx xxxx xxxx

Multi line custom fields

Project fields configuration

It is now possible to configure which standard fields and functions that should be used for projects.

The configuration is performed in the section Project fields and functions configuration in the System Options page.

The setting is performed on workspace level.

Project fields and functions configuration	
Field / Function	Enabled
Customer	<input checked="" type="checkbox"/>
Proj No	<input checked="" type="checkbox"/>
Status	<input checked="" type="checkbox"/>
Start and End date	<input checked="" type="checkbox"/>
Currency	<input type="checkbox"/>
Parent project	<input checked="" type="checkbox"/>
Project manager and Status reporting reminder	<input checked="" type="checkbox"/>
Portfolio	<input checked="" type="checkbox"/>
Documents	<input type="checkbox"/>
Project Status	<input checked="" type="checkbox"/>
Earned Value	<input checked="" type="checkbox"/>
Project Roles	<input type="checkbox"/>
Department/Organization Name	<input type="checkbox"/>

The Project fields and functions configuration section in System Options

Non-displayed fields and functions are not displayed in the following places:

- Project details
- Project history
- Project list filter/column selection/sorting
- Project office filter/column selection/sorting
- Project office print-out column selection
- Project office details
- Project office details print-out
- Analysis

Customer: There must be a default customer defined in order to disable the customer field.

Project start date: If the project start date is not enabled, the current date is saved to the database at the time of the project creation.

Currency: If currency is not enabled, the currency value in system options is saved on the project at the time of project creation.

Status: If status is not enabled, the field is left empty.

Project manager: If the project manager field is not enabled:

- The Status report reminder activated check box is not displayed
- The Status Reporting icon in project office is not displayed
- The Status Report Reminder e-mails are not sent out.

Standard fields migration to custom fields

In order to simplify the system and at the same time make it more flexible, a number of standard fields have been converted to custom fields or removed. The intention is that each customer should be able to configure the system to their own needs.

The following fields have been changed to custom fields:

- Project Category
- Additional category 1
- Additional category 2
- Budget
- Spent
- Forecast
- Comments
- Internal comments
- Description
- Customer Contact
- Our Contact
- Reference

If the field is not in use, it has been deleted.

All fields that are converted to custom fields are moved into the custom fields area. The field order in the custom fields is the same as the current field order. In the example below the field order will be

- Organization
- Priority
- Budget
- Spent
- Forecast
- Comments

... and so on

The field order can be changed on the Project Custom fields definition page in the Admin tab.

The screenshot displays a project management interface with the following sections:

- Details Tab:** Fields for Customer Name (Reseföretaget Sverige), Project Name (CRM-projekt), Status (In Progress), Currency (SEK Swedish Krona), Default Rate (800.00), Default Cost (0.00), Project start date (01/11/2009), Project End Date (31/12/2010), and Parent Project.
- Custom Fields Section:**
 - Organization and Priority:** Two dropdown menus highlighted with a red box.
 - Project Status:** A table with columns for Tid, Budget, Funktion, Risk, Comments, and Published.

Tid	Budget	Funktion	Risk	Comments	Published
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Projektet är ca 2v. försenat p g a avsaknad	<input checked="" type="checkbox"/>
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Risk finns att scope behöver minskas för at	<input checked="" type="checkbox"/>
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>		<input checked="" type="checkbox"/>
 - Budget, Spent, Forecast:** Three input fields with values 150,000.00, 35,000.00, and 155,000.00, highlighted with a red box.
 - Earned Value Table:**

PV	AC	EV	BAC	CV	SV
CPI	SPI	EAC	ETC	VAC	
 - Comments and Internal Comments:** Two text input areas highlighted with red boxes.
 - Additional Project Information:** A large text input area for Description highlighted with a red box.
 - Customer Contact, Our contact, Reference:** Three input fields at the bottom.

Default filter in the project list

It is now possible for administrators to create default filters in the project list.

The default filter controls how the list is setup and which data to display **the first time** the user accesses the list. The next time the user returns to the list, the display will be the same as when it was left. The default filter is available to all users to be used at any time.

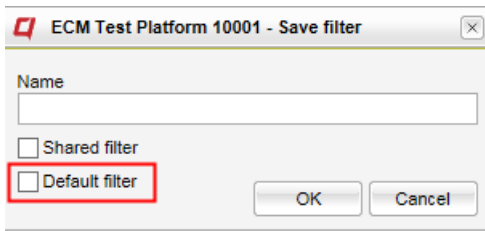
The default view have the same flexibility in setup as other user defined filters.

Permission required to set up a default filter.

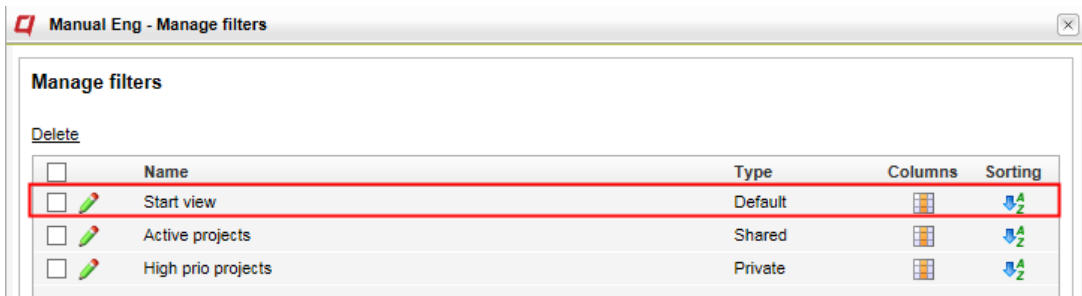
- Project module permission = Administrator



Filter selection list box



Save filter dialog



Manage filters dialog

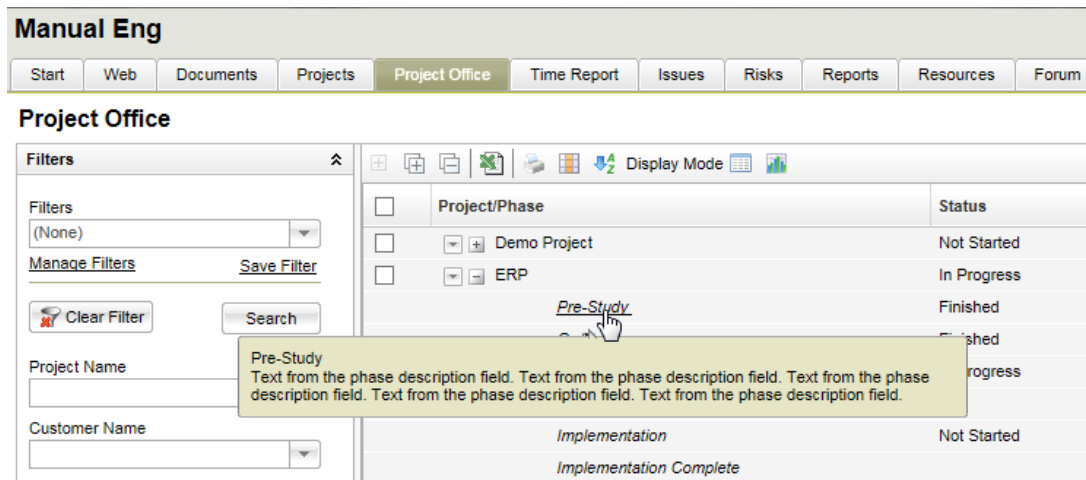
Increased number of analyzable fields

The maximum number of analyzable fields has been increased to 10.

Project Office

Activity description for phases

The tooltip for phases in project office now contains the phase name and the activity description.



Project Office list page

Activity description is displayed in the phase section in project office details. The activity description is also included on the print-out.

Phase	Start	End	Status	
Pre-Study Text from the phase description field. Text from the phase description field. Text from the phase description field. Text from the phase description field. CR - Text from the phase description field. Text from the phase description field. Text from the phase description field. Text from the phase description field. Text from the phase description field. CR - Text from the phase description field. Text from the phase description field. Text from the phase description field. Text from the phase description field. Text from the phase description field. CR - Text from the phase description field. Text from the phase description field. Text from the phase description field. Text from the phase description field. Text from the phase description field. CR - Text from the phase description field.	07/11/2012	11/04/2013	Finished	●
Go/No Go	11/04/2013	11/04/2013	Finished	●
Initiation	12/04/2013	25/04/2013	In Progress	●
Initiation Complete	25/04/2013	25/04/2013		●
Implementation	17/04/2013	25/06/2013	Not Started	●
Implementation Complete	26/06/2013	26/06/2013		●

Project Office details page

Issue management

Sums in issues


There is now support for displaying the sum of selected records in the issues list.

	No.	Name	Status	Color Status	Budget	Spent	ETC	Forecast
Sum					260.00	3.00		163.00
<input type="checkbox"/>	1	Issue 1	Closed	●	120.00	0.00	120.00	120.00
<input checked="" type="checkbox"/>	2	Issue 2	Closed	●	0.00	0.00	0.00	0.00
<input type="checkbox"/>	3	Find new project manager	New	●	40.00	0.00	40.00	40.00

Sums in the issue list

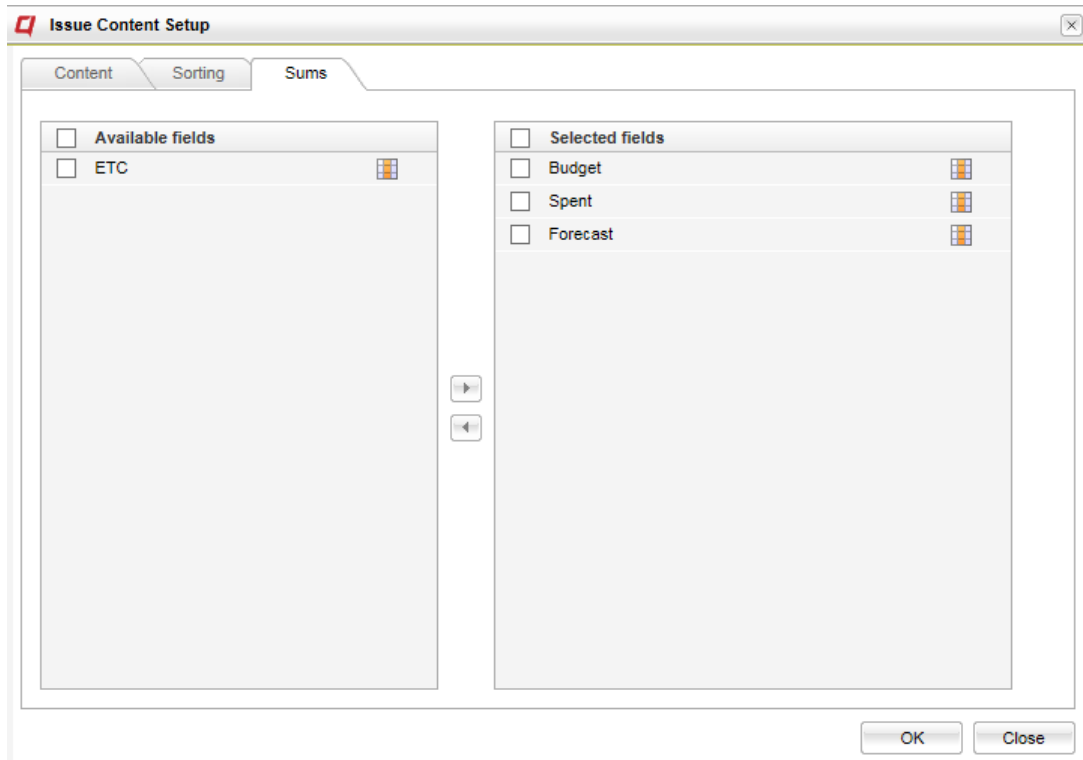
The sum value is the sum of field values for all records selected by current filter for the specified field.

The sum row is displayed in the list if one or more field is selected for display of sums.

A new toolbar icon, , is implemented. Click on the icon opens the Content setup dialog, with the sums tab selected.

The available fields pane contains fields that are:

- selected in the Content tab AND
- numeric
 - all numeric custom fields (both 'Issue Type Specific' and 'Activity and Issue')
 - selected standard fields



Sums configuration tab

Improved export of issues

1. If no rows are selected => All issues according to the current filter are exported
2. If one or more rows are selected => Export the selected rows only. Issues from different pages can not be selected.

Risk management

Risk details improvements

Multi line custom fields always start on a new row and are dynamically expandable dependent on the amount of text.

The screenshot shows the 'Risk 1' details page in the 'ECM Test Platform 10001'. The page has a navigation bar at the top with tabs for Start, Web, Documents, Projects, Project Office, Time Report, Issues, Risks, Reports, Resources, Forum, Tasks, and Calendar. The 'Risks' tab is active. Below the navigation bar, there are buttons for 'Back' and 'Add', and a '1 of 78' indicator with up and down arrows. The main form contains several fields: 'Risk Number' (1), 'Risk Name' (Risk 1), 'Project Name' (TestReduceNumberLife), 'Probability' (6 - a medium risk), 'Consequence' (3 - severe), 'Score' (18), 'Decimal number' (14), 'Decimal number 2' (2), 'Decimal number 3', 'Decimal number 4', 'Text (single row)', 'Integer' (156), 'Date' (20/08/2015), 'Date 2' (30/11/2015), 'Pick list (one choice)' (3), and 'Responsible' (Joe Anderson). Two multi-line custom fields, 'Budget consequences' and 'Mitigation', are highlighted with red boxes. The page also includes 'Created by', 'Modified by', and 'History' information, and 'Save' and 'Cancel' buttons at the bottom.

Risk details page

In order to simplify the system and at the same time make it more flexible, three standard fields have been converted to custom fields or removed. The intention is that each customer should be able to configure the system to their own needs.

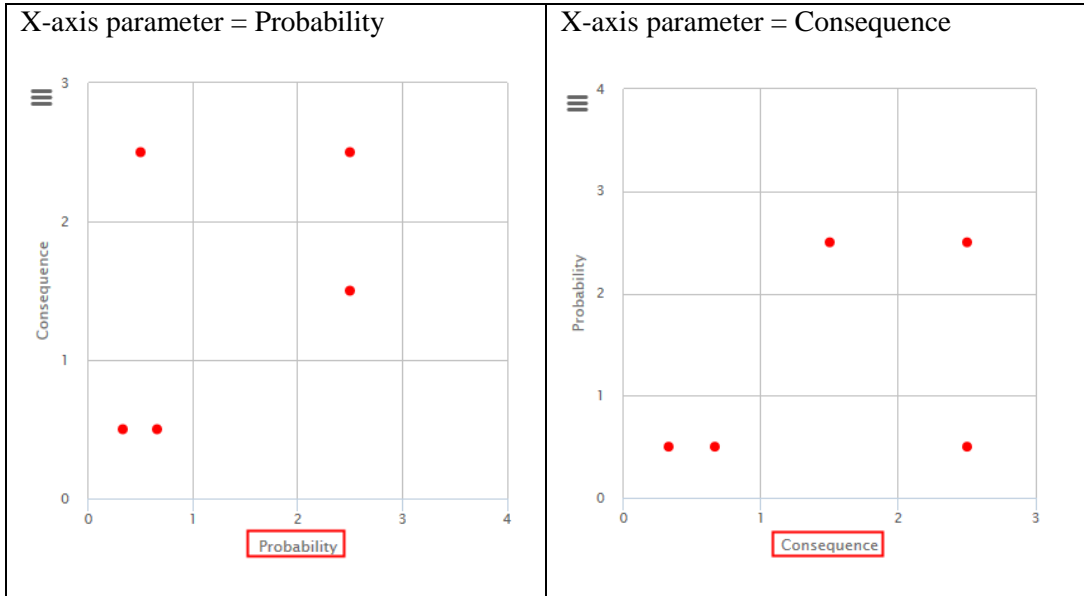
The following fields have been changed to custom fields:

- Risk type
- Closed
- Mitigation

If the field is not in use, it has been deleted.

Parameter for axis definition of Probability and Consequence

It is now possible to switch the axis for the risk matrix. A new parameter is introduced where an administrator can decide if Probability or Consequence should be used on the x-axis.



Risk matrix

The new setup parameter “X-axis parameter” in the Risk parameters page.

Risk parameters

<input type="checkbox"/>	Value	Probability	Description
<input type="checkbox"/>	1	Low	
<input type="checkbox"/>	2	Medium	
<input type="checkbox"/>	3	High	
<input type="checkbox"/>	4	Very high	

Delete New

<input type="checkbox"/>	Value	Consequence	Description
<input type="checkbox"/>	1	Minor	
<input type="checkbox"/>	2	Medium	
<input type="checkbox"/>	3	Major	

Delete New

Top Risks Score Limit

X-axis parameter

Save Cancel

Risk parameters page