



Webforum

New Functions in Version 14.3

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About this document

This document describes the main new functionality in the Webforum 14.3 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:

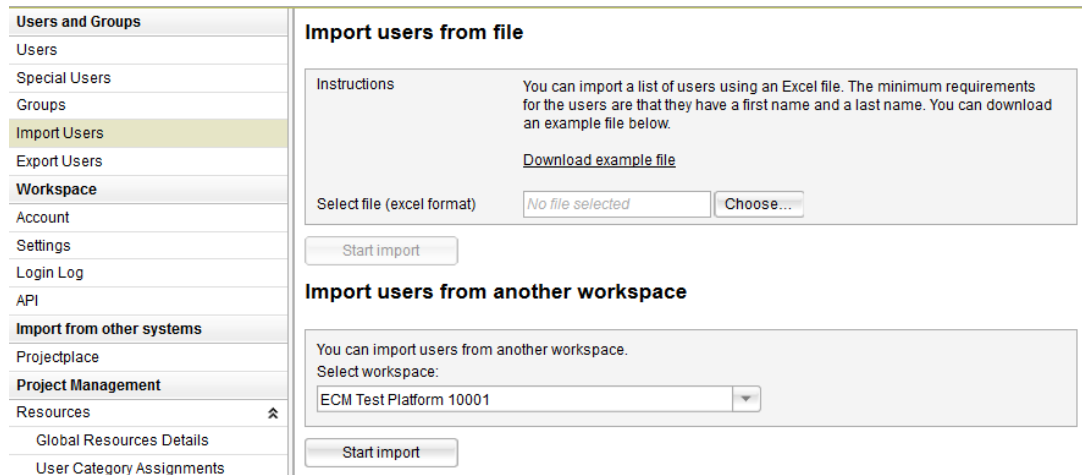
Module/Function	Description of changes
General&Administration	Import users from another workspace
	New login GUI & removed “inline” login.
Documents	Use formulas in metadata import files
	Show code and description for attribute code structures
	Update code structures directly in the system
	GUI for setting display file connections
Contacts	Contacts are now available in the mobile interface
Project Management	Critical Path
	Export of resources from the project list
	Category name changes
	Print from Project Details
Resource Utilization	New GUI for filters
	Logging of booking status changes
Risk management	“Risks” is now available as a top module
Issue management	New GUI for issue details
Reporting	New dimension: Calendar Aggregation

General & Admin

Import users from another workspace

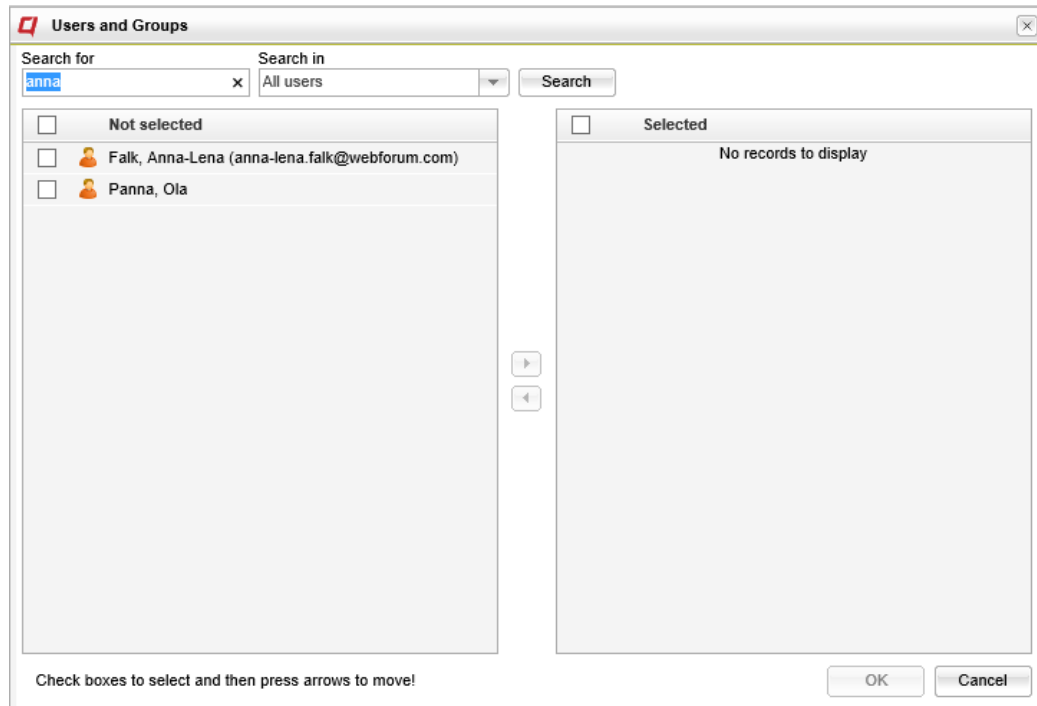
It is now possible to import users from another workspace, it is done from the admin part of the system and under “Import Users”.

Select a workspace to import from. Workspaces where you have access to the Contacts tab or have Admin rights are displayed.



Import users

Select users to import. Also users already added to the current workspace are displayed. They will not be imported again if selected.



Select users

The users to be imported are displayed and it is possible to add them to a group.

Import users - Preview

Row	First Name	Last Name	E-mail Address
1	Anna-Lena	Falk	anna-lena.falk@webforum.com
2	Ola	Panna	

Select a group that all imported users will belong to: (None) Show project groups

Select group membership and complete the import

New login GUI & removed “inline” login.

There is a new GUI for login in to Webforum, design to be easier to read.

Manual Eng

Remember me [Forgot password?](#)

 <http://www.webforumtest.com/manualeng>

 <http://www.webforumtest.com/manualeng/mlogin>

Provided by Webforum

Login GUI

The inline login, i.e. the possibility to show the login function as a part of a Webforum external site, is taken away. The login page will always be shown as a separate window.

Documents

The changes below are all related to Webforum Professional and working with metadata or display files.

Use formulas in metadata import files

Simple excel formulas can now be used in metadata files when importing files via the import function. This is useful when working with large sets of data and when there may be a need to let a certain field have information based on other fields.

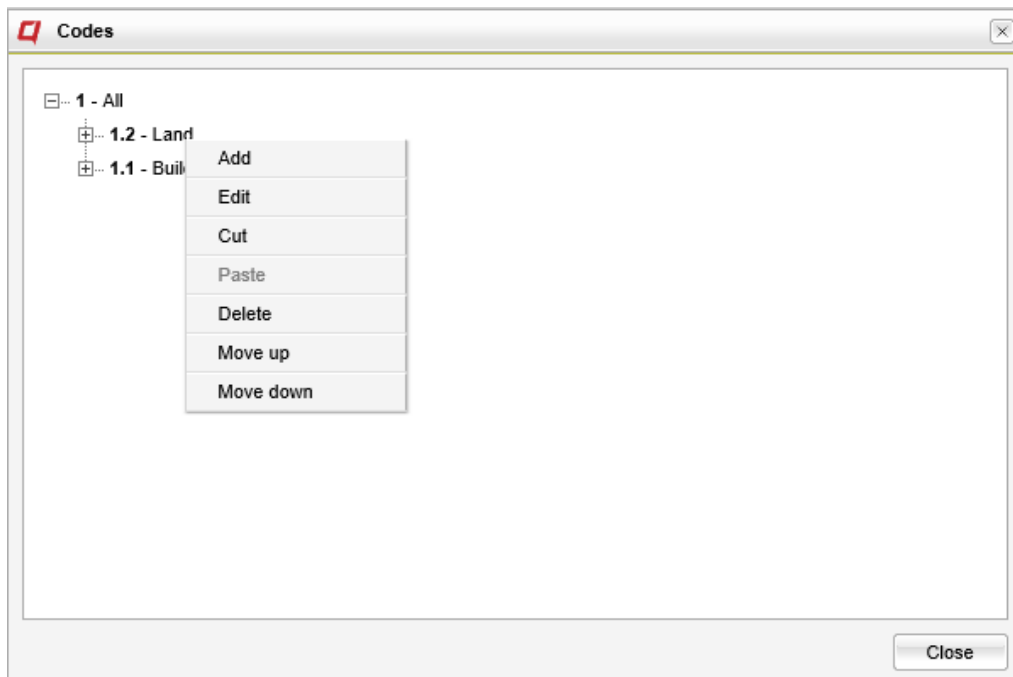
Show code and description for attribute code structures

Both code and description are now displayed as a tooltip when the code is displayed as a column in the document archive.



Update code structures directly in the system

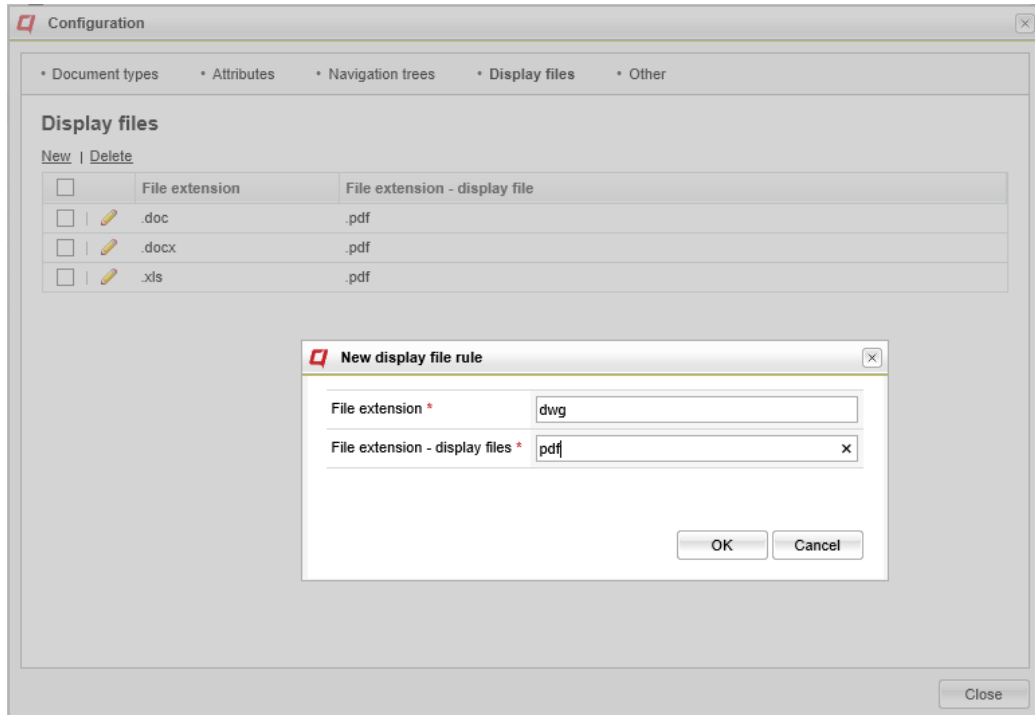
Right click a code value in order to update or delete it, move it in the structure or to add a value below it in the structure.



Context menu for a code structure value.

GUI for setting display file connections

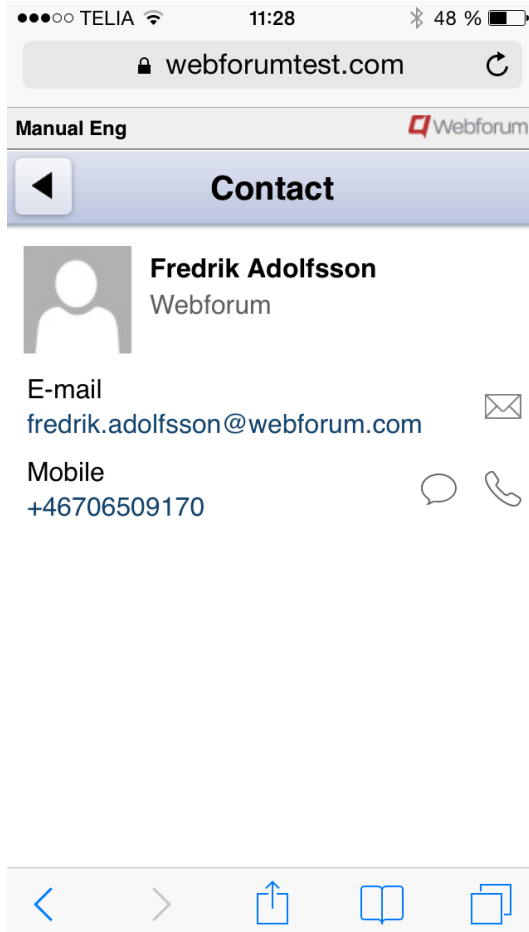
There is a display file menu option available under document configuration. Here it is possible to associate file extensions and display file extensions. For all files types that have associated display files it is then possible for a user to connect such a display file to the normal file via the context menu for the document.



Display file type association

Contacts

Contacts are now available in the mobile interface. This makes it easier to e-mail, call or send SMS to the contacts from a mobile smartphone.




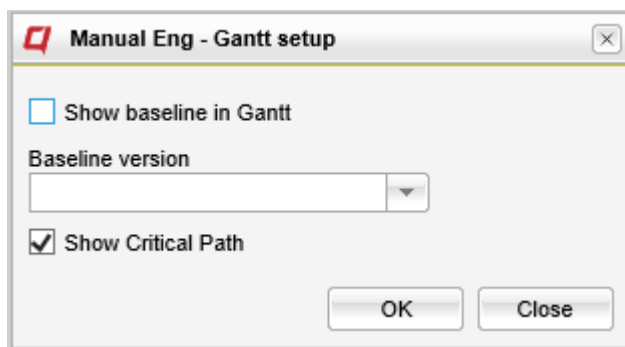
Mobile interface for contacts

Project Management

Critical Path

The critical path is defined as those activities that affect the end date of a project. The critical path will consist of those activities with the same end date as the end date of the last activity plus activities which those activities are dependent on.

It is possible to display the critical path in the planning GUI. In order to turn on the display of the critical path, click on the GANTT set up icon  above the GANTT schedule. Then choose "Show Critical Path".



Show Critical Path

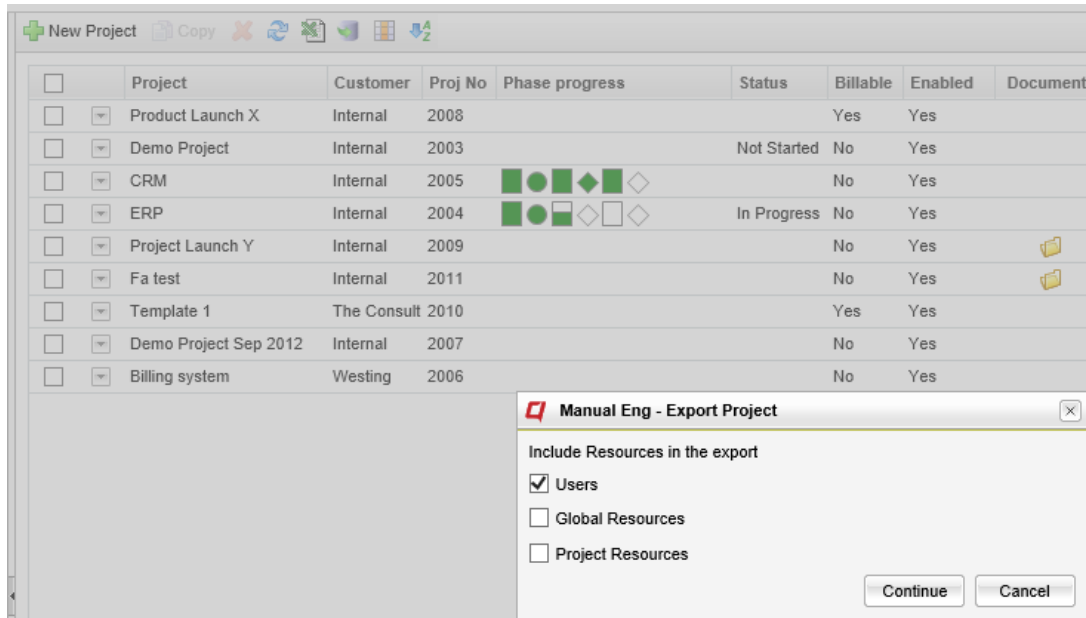
The critical path will be shown as activities with red around them.

Activity/Task	Start	End	Duration	Status	% complete	Priority	Budget		Jan 2012	Feb 2012
<input type="checkbox"/> act 1	01/02/2012	01/02/2012	1		0 %		hr		02	
<input type="checkbox"/> act 2	17/02/2012	17/02/2012	1		0 %		hr		09	
<input type="checkbox"/> act 3	07/02/2012	07/02/2012	1		0 %		hr		23	
<input type="checkbox"/> act 4	16/02/2012	20/02/2012	3		0 %		hr		30	06
<input type="checkbox"/>									13	20

Critical path

Export of resources from the project list

It is possible to export resources when exporting other project information. Click the excel icon in the project list toolbar to export all those projects that are displayed using the current filter. You will be given an option to include users and other resources in the export file.



Resource export












The users & other resources will be displayed in a separate column, just like other fields, but there will be one row per resource in a project.

	A	B	C	D	E	F	G	H	I
	Project	Customer	Proj No	Phase progress	Status	Billable	Enabled	Documents	Resources
1	Product Launch X	Internal	2008			Yes	Yes		
2									Adolfsson, Fredrik (fredrik.adolfsson@webforum.com)
3	Demo Project	Internal	2003		Not Started	No	Yes		
4									Adolfsson, Fredrik (fredrik.adolfsson@webforum.com)
5									Arvidsson, Johan (johan.arvidsson@webforum.com)
6									Kallhauge, Per (per.kallhauge@webforum.com)
7									Kotkajuuri, Pekka (pekka.kotkajuuri@webforum.com)
8									
9	CRM	Internal	2005			No	Yes		
10	ERP	Internal	2004		In Progress	No	Yes		
11									Adolfsson, Fredrik (fredrik.adolfsson@webforum.com)
12									Kallhauge, Per (per.kallhauge@webforum.com)
13	Project Launch Y	Internal	2009			No	Yes	https://secure.webforumtest.com/manualeng/doc/?dfRefID=8	
14	Fa test	Internal	2011			No	Yes	https://secure.webforumtest.com/manualeng/doc/?dfRefID=10	
15	Template 1	The Consulting Compar	2010			Yes	Yes		
16	Demo Project Sep 2012	Internal	2007			No	Yes		
17									Adolfsson, Fredrik (fredrik.adolfsson@webforum.com)
18	Billing system	Westing	2006			No	Yes		

Export file

Category name changes

It is now possible to change names on all Activity-, Project- and Resource categories. Click on the pen icon next to the category name to change the names.

Users and Groups	Categories
Users	Category
Special Users	Object
Groups	Job Role
Import Users	Project Portfolio
Export Users	 Activity Categories Activity
Workspace	 Additional Activity Category 1 Activity
Account	 Additional Activity Category 2 Activity
Settings	Issue Status Issue
Login Log	Issue Resolution Issue
API	Issue Type Issue
Import from other systems	Issue Link Type Issue
Projectplace	  <input type="text" value="Project Categories"/> Project
Project Management	 Additional Project Category 1 Project
Resources 	 Additional Project Category 2 Project
Global Resources Details	 Resource Categories Resource
User Category Assignments	 Additional Resource Category 1 Resource
Job Role Assignments	 Additional Resource Category 2 Resource
Calendar	Risk types Risk type
Customers	
Categories	

Change of category name

Print from project details

There is now a print button available in project details.

Demo Project

Details Resources Planning Activity Details Resource Allocation Budget and control

Customer Name * Internal	Project Name * Demo Project	Status Not Started
Currency * EUR Euro	Default Rate 0.00	Default Cost 0.00
Project start date * 15/02/2012	Project End Date 30/11/2014	Parent Project
Project Categories * Standard Project	Additional Category 1 Standard	Additional Category 2 Standard
Project Manager	Progress Bar Based On % Complete	Project Office Gantt Bar Color
<input checked="" type="checkbox"/> Enable in Project Office	<input type="checkbox"/> Enable Project Folder	<input type="checkbox"/> Enable In My View
<input type="checkbox"/> Project Template	<input type="checkbox"/> Billable	<input checked="" type="checkbox"/> Enabled

Custom Fields

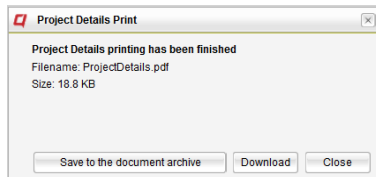
Project Status

Additional Project Information

Project Office Project List Save Cancel Print

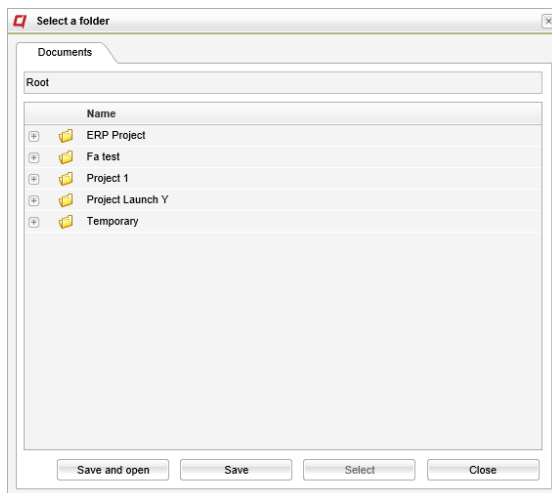
Print from project details

When printing, there is an option to save the print file in the document archive. This function is also available when printing from the project office summary page.



Print options

If "Save to the document archive" is chosen, it is possible to choose in which folder to save the print file.



Print - Folder selection

Resource Utilization

New GUI for filters

The resource utilization filtering function has a new GUI which is similar to other filter GUIs in the system. The filters are now available as a pane to the left of the utilization information.

Resource Utilization

The screenshot shows the 'Resource Utilization' interface. On the left is a 'Filters' pane with various dropdown menus and input fields for filtering resources. The main area displays a list of resources with columns for 'Resource / Project', 'Start', 'End', and 'Booking'. A specific booking for 'Demo Project (Internal)' is highlighted with a date range of 15/02/2012 to 31/10/2014 and 240.00 hours. On the right, a utilization table shows data for 'Sep 2014' and 'Oct 2014' across various dates. The table uses color coding: green for utilization below 40.0, blue for 40.0, and red for above 40.0.

Sep 2014		Oct 2014				No		
1	8	15	22	29	6	13	20	27
10.0	20.0	40.0	40.0	40.0	50.0	40.0	0.0	0.0
10.0	20.0	40.0	40.0	40.0	50.0	40.0	0.0	0.0
40.0	40.0	40.0	40.0	40.0	40.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
30.0	30.0	30.0	30.0	40.0	40.0	40.0	40.0	40.0
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Logging of booking status changes

It is possible to see the booking history for a resource in a project by clicking on “Booking history” in the project context menu below a resource.

The screenshot shows a context menu for a resource named 'Adolfsson, Fredrik (fredrik.adolfss...)'. The menu is open, showing options: 'Edit booking details', 'Paste ETC from Project Plan', 'Remove booking', 'E-mail booking', 'Booking history', 'Open Project Details', and 'Open Resource Allocation'. The 'Booking history' option is highlighted.

Booking history

The booking history shows a log related to the booking status “Booked”. It logs when the status is changed to or from status “Booked”, changes to the number of booked hours as well as changes to project dates.

Field	Old value	New value
Fredrik Adolfsson 02/09/2014 14:43:36		
Booking status	Preliminary	Booked
Booking	0.00	280.00
Fredrik Adolfsson 02/09/2014 14:44:43		
Booking	280.00	320.00
Fredrik Adolfsson 03/09/2014 06:47:57		
Project End Date	31/10/2014	30/11/2014

Booking history - Details

Risk management

Risk Management is now available as a top module, which means that it is possible to get a complete view of the risks for all projects on a workspace. In additions to the filters available on the project level, risks as a top module also has Project Name as a filter and display possibility.

Risk No.	Risk Type	Risk Name	Probability	Consequence	Mitigation	Closed	Score	Project Name
1	Resources	Contract with s...	1 - Low	3 - Major	Get legal to spe	No	3	ERP
2	Resources	No programmer 3	3 - High	2 - Medium	Try to find suita	No	6	ERP
3	Budget	Budget problem 3	3 - High	3 - Major	There are indic	No	9	ERP
4	Resources	Key reources 1	1 - Low	1 - Minor		No	1	ERP
2	Budget	risk 2	1 - Low	1 - Minor	text 1 text 2	No	1	CRM

Risks as a top module.

Access to this module can be switched on/off based on user groups, just like for any other module.

Issue management

The issue details page has a new layout. The main difference is that more focus is on the content of the issue. Category fields have been placed in a column to the right of the content fields.

The screenshot displays the 'Issue 1' details page. At the top, there are buttons for 'Assign', 'Comment', and 'Change Status', along with a 'More actions' dropdown. The main content area is divided into sections: 'Summary' (containing the issue title 'Issue 1'), 'Description' (with a text area containing 'Layout error in module x, see screenshot below.'), 'Attachments' (showing a screenshot of a 'New risk.png' file), 'Linked Issues' (with a link to '6 test'), and 'Comments' (listing three comments from Fredrik Adolfsson). On the right side, there is a vertical column of metadata fields including 'Project Name', 'Reporter', 'Assigned to', 'Issue Type', 'Status', 'Color Status', 'Resolution', 'Severity', 'Priority', 'Found in release', 'Fixed in version', 'Created by', and 'Modified by'. At the bottom right, there is a 'History' link.

Issue details

The various menu choices have been reordered so that options related to the issue displayed are on one row and navigation back to the list or to other issues is on a row above.

Some menu alternatives have been moved to the "More actions" drop down list.

The screenshot shows the 'More actions' dropdown menu with the following options: 'E-mail', 'Export to my calendar', 'Subscribe', 'Add Link', 'Copy URL to Clipboard', and 'Export comments'.

More actions

Picture attachments are now displayed directly on the screen.

The GUI for summary, description and comments has also been changed to make it easier to read.

Reporting

A new dimension, Calendar Aggregation, has been added in the Charts and Analysis Beta versions of the reporting. It has not been added to the Analysis version.

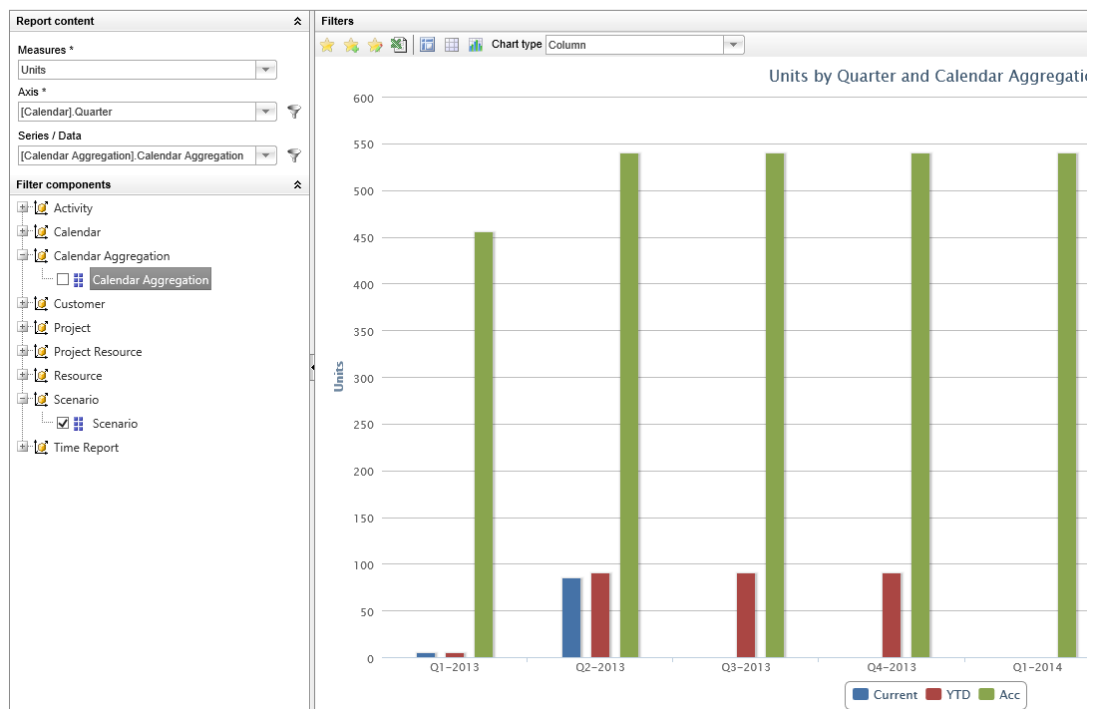
Calendar aggregation makes it possible to visualize aggregated values over longer periods. Previously, the charts module has shown for instance the budget or spent information for each month separately, but not aggregated.

The calendar aggregation dimension contains 3 members:

- Current - displays values for the period displayed
- Acc - displays accumulated values for all periods up until the period displayed
- YTD - displays year-to-date values

Charts

Analysis | Charts | Analysis BETA



Calendar aggregation

In cases where no Calendar Aggregation member is chosen as a filter, the Current value will be displayed, which is similar to how the reporting works today.