Webforum

New Functions in Version 14.4

Last update: 2014-12-05

Contents

About this document

This document describes the main new functionality in the Webforum 14.4 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	Easier access to new workspaces for existing Webforum users
	Faster page loading
Documents	Serial review and approval workflow
	Attribute search field set up
	Easier download of lent out documents
	Last visited folder shown in the mobile interface.
Calendar	Easier to remove cancelled meetings from your own calendar.
Project Management	Free text search in project list
Resource Utilization	Project-Resource view
	Global resources can have Job Roles
Issue management	Web forms

General & Admin

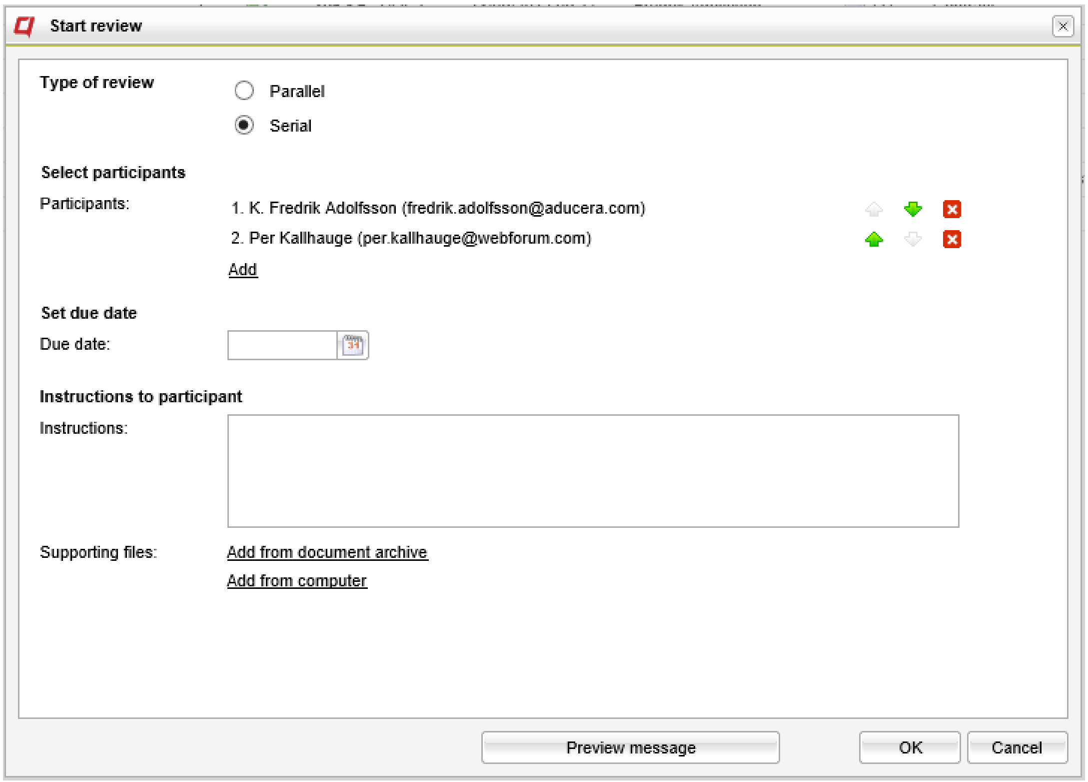
Existing Webforum users can access new workspaces that they have been invited to without necessarily accepting an invitation. The workspace will be visible in the workspace list in the top right corner of the system.

Documents

Serial review and approval workflow

There are now serial review and approval workflows. Previously there have only been parallel workflows. A serial workflow is started the same way as a parallel workflow.

In a serial workflow it is possible to choose in which order persons shall review/approve a document. Once the first person has reviewed/approved a document, it will automatically be sent to the next person.

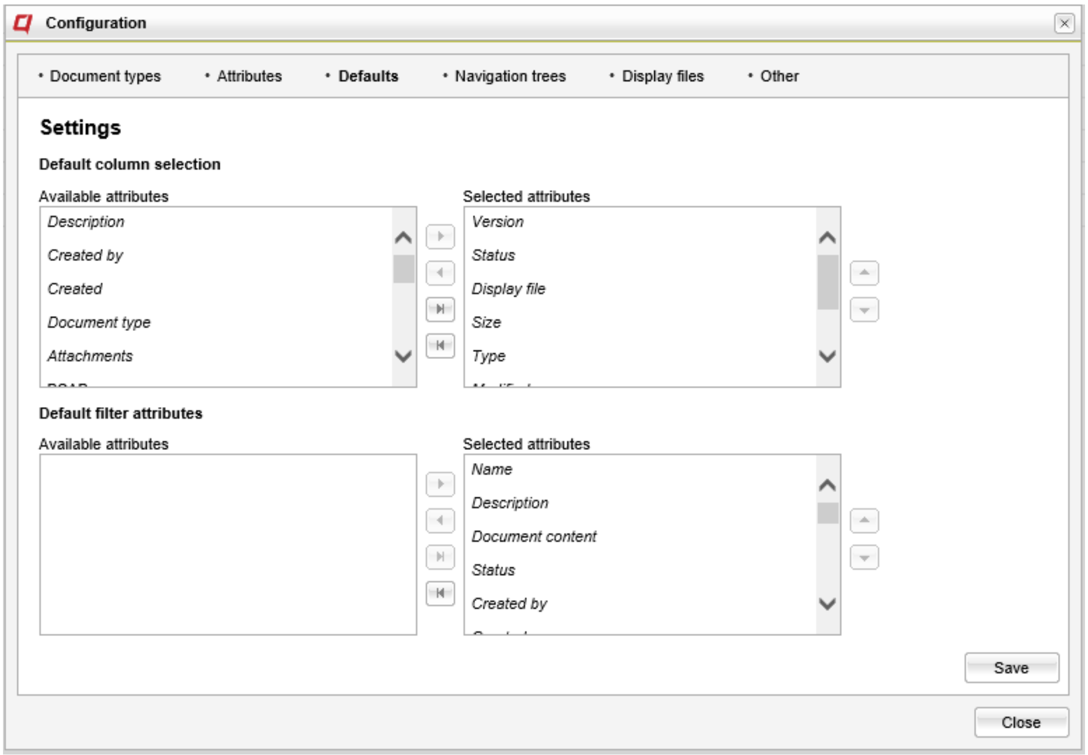


Serial workflow

Attribute search field set up

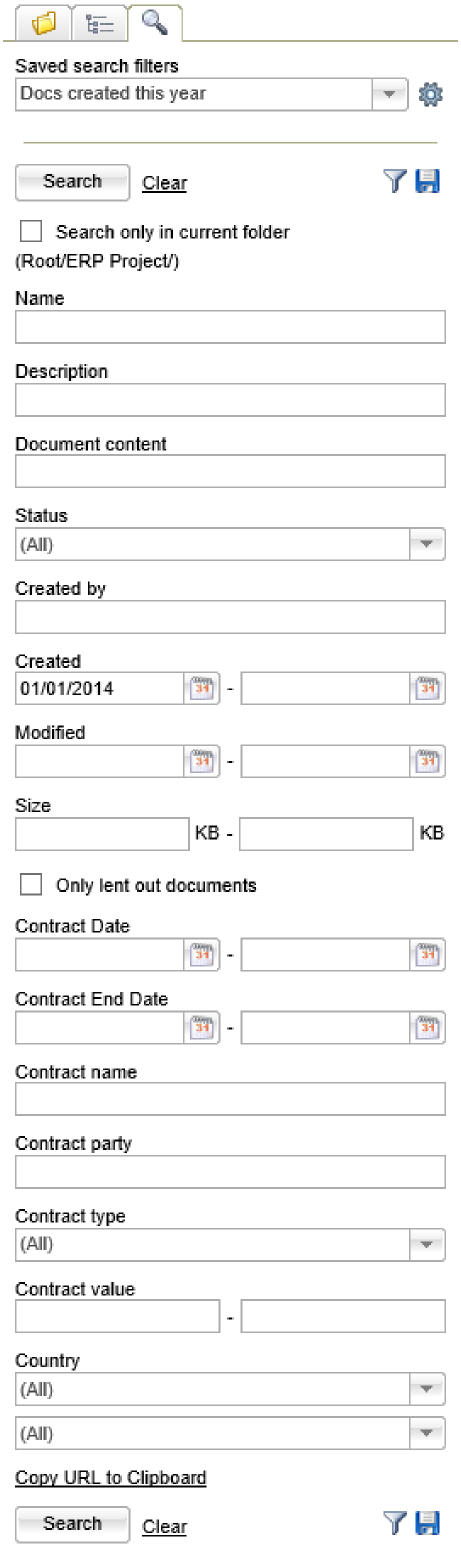
There is now an option to save search field set ups. An administrator can choose the default set up for new users and users can choose to modify the default set up for their own use.

The administrator config is made where all other document configurations are made, and are accessed via the config icon on the document toolbar. The options are found under “Defaults”



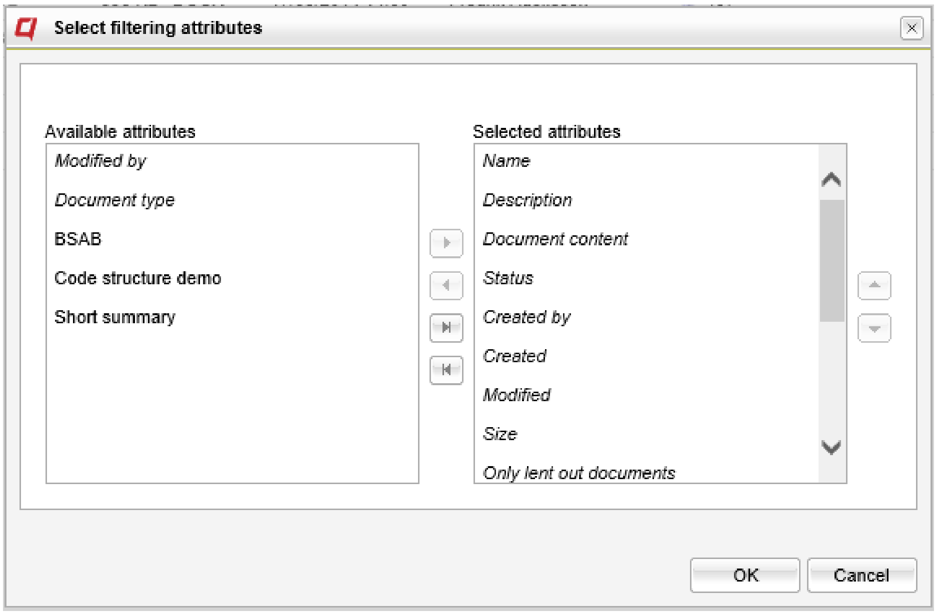
Default Column and Filter Set Up

You can choose filter selection by clicking the funnel icon on the search page.



Filters

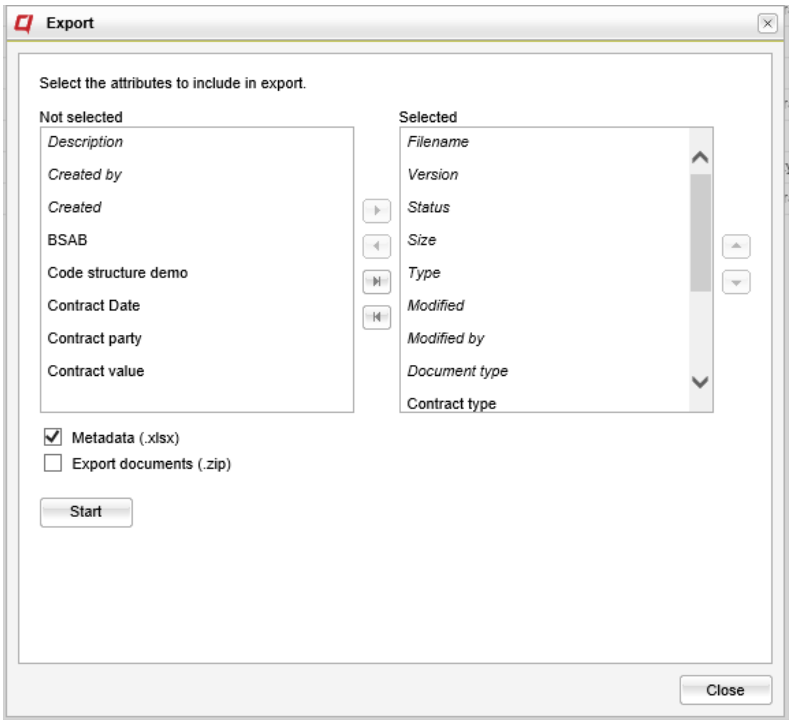
You will be given options to choose attributes to use in the filter panel.



Filter attributes

Easier download of lent out documents

When lending out documents, you will automatically be given a choice to download them as well. The option is the same as an ordinary export.



Export after lending out documents

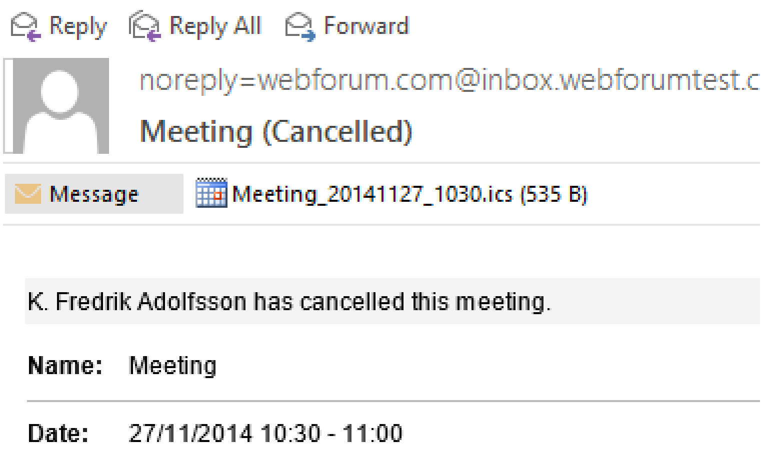
Last visited folder shown in the mobile interface.

When opening the document archive in the mobile interface, the last visited folder will be shown by default.

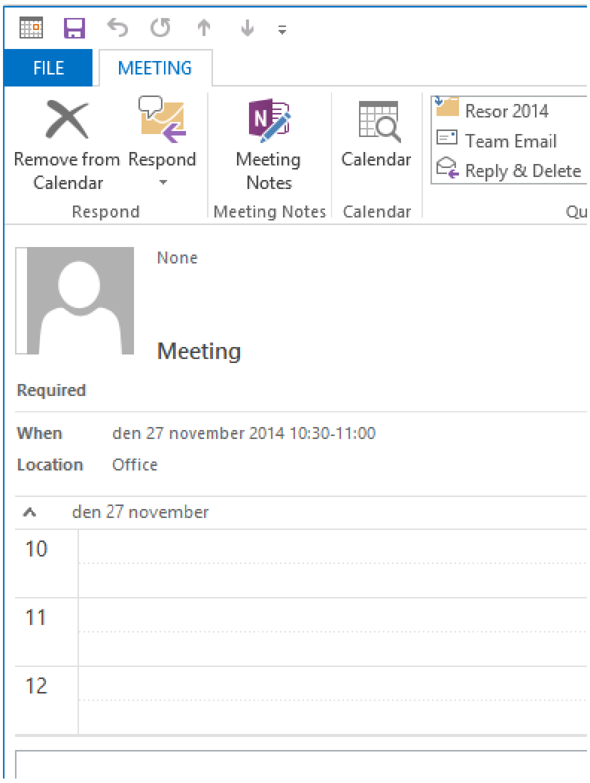
Calendar

It is now easier to remove cancelled (deleted) meetings from the calendar.

When a meeting is cancelled, the participants will receive an e-mail with cancellation information.



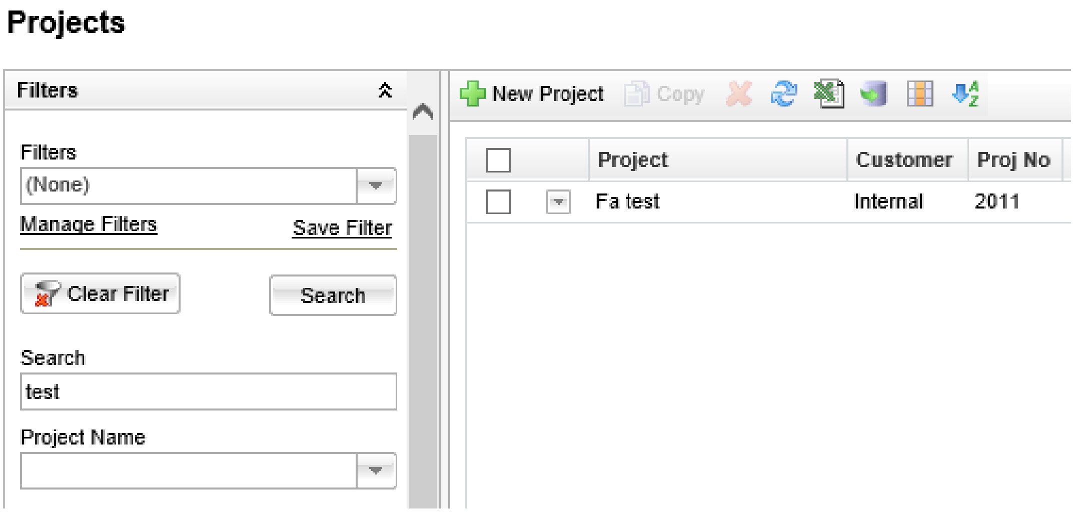
If the included file is opened, the meeting will open and, depending on your calendar program, it will be possible to remove the meeting from the calendar.



Meeting in calendar

Project Management

There is now a free text search option in the project list. This means that you can search for a text such as “test” and all projects with test in the searched fields will be listed.



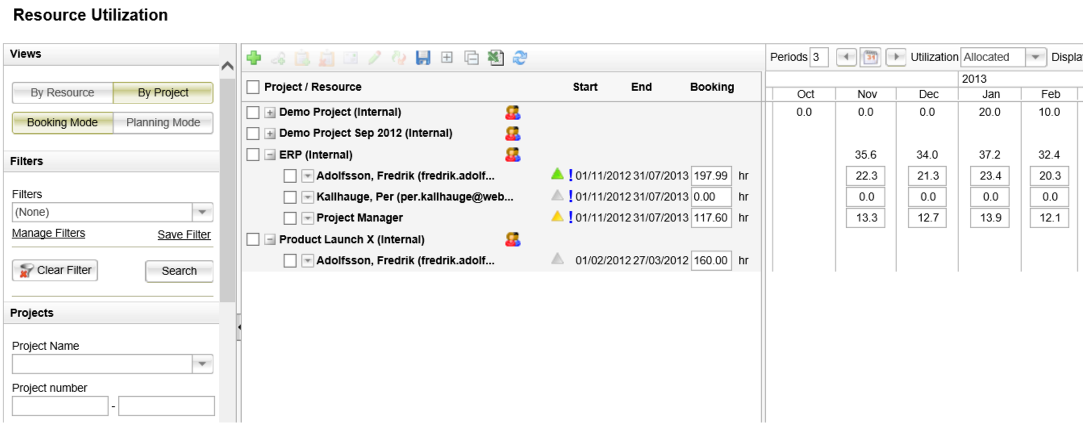
The following fields are included in the free text search:

- Customer name
- Project name
- Project category
- Additional category 1
- Additional category 2
- Project manager (first name, last name)
- Custom fields of type text and pick list
- Comments
- Internal comments
- Description
- Customer Contact
- Our contact
- Reference
- Comment fields for the project statuses

Resource Utilization

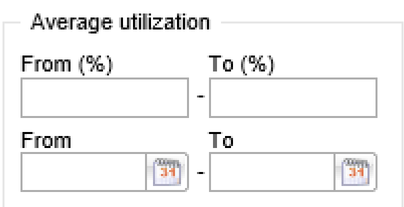
There is now a Project-Resource view in addition to the Resource-Project view. This means that it is possible to get an overview of the resource situation by project and resource without using the reporting tool.

With this addition, the interface has also been changed a bit to make the choice of view clearer. Both the “By Resource” and “By Project” views can be shown in Booking and Planning Mode. Changes to the resource booking can be made in both views if “Booking Mode” is chosen.



Resource Utilization

For the “By Project” view, there are filters for both Projects and Resources. For the “By Resource” view, there are only filters related to resources. The “Average Utilization” filters are only available in the “By Resource” mode.



Average utilization

Job Roles

A global resource is often assigned to a project in order to display a need for a certain type of competence before it is known exactly who will perform the task.

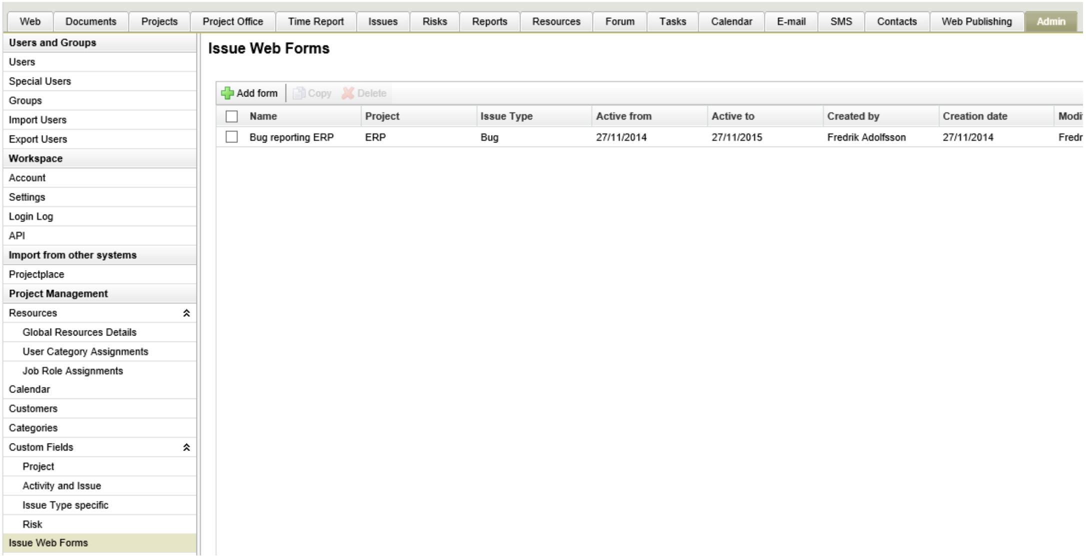
A global resource can now be assigned a job role.

Global resource details

This means that it will be easier to see both supply and demand in the Resource Utlization view since a search for resources with for instance a job role ”Project Manager” can display both users with that competence and global resources with that competence.

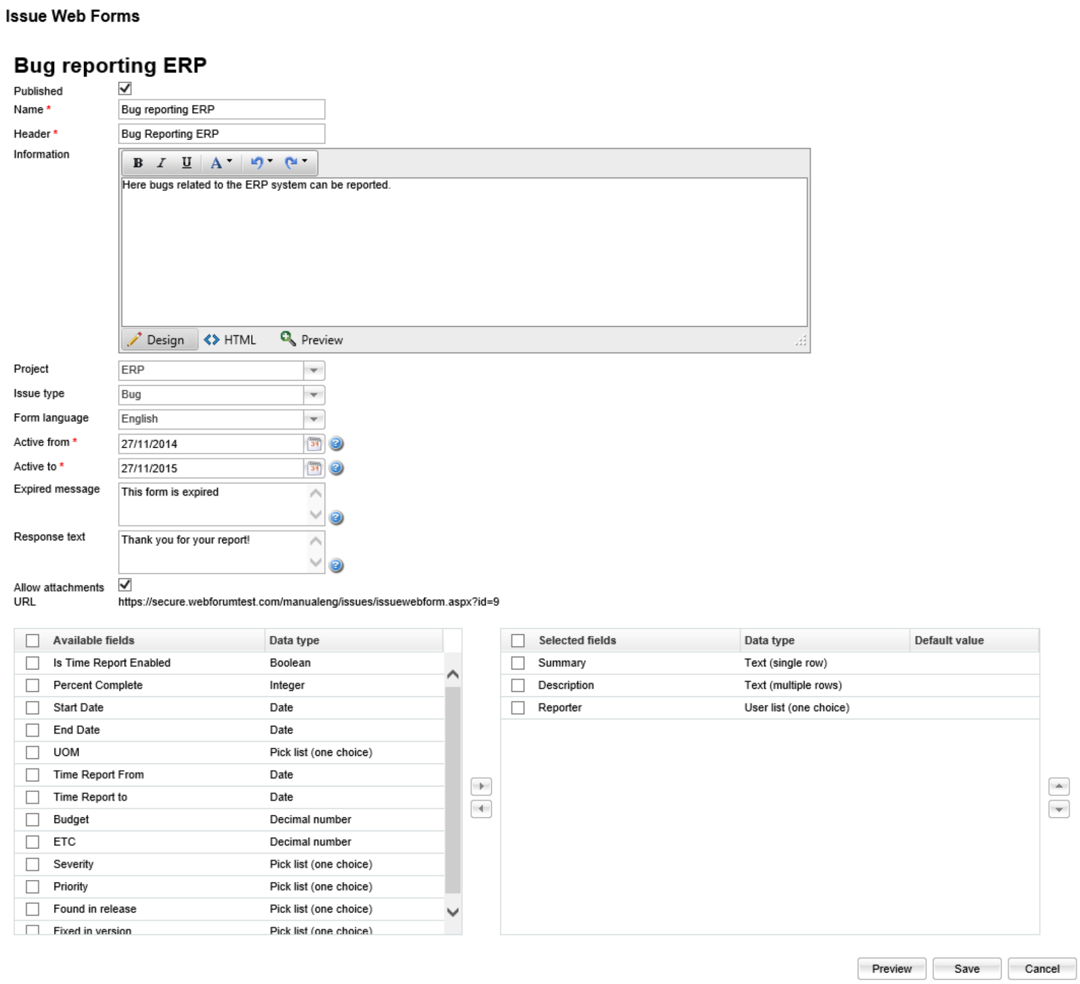
Issue Management

Web forms for issues have been introduced. Web forms are added from the admin menu.



Issue Web Forms

A form for a specific issue type can be set up. It is also possible to set a project to which the form belongs. The form can then be published on the internal web pages, which makes it easier for users to report issues without having to open the issue module.



Adding a Web Forum

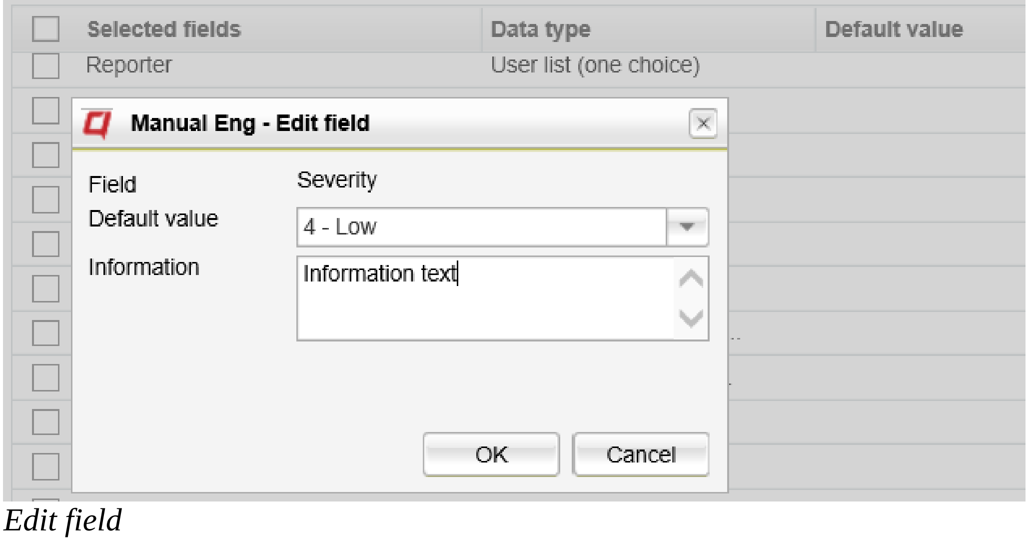
When setting up web forms, it is possible to choose which fields to show on the form. Normally the one reporting an issue does not have to see all fields.

It is also possible to write a heading and an explanatory text which will make it easier to understand how to use the form.

Field explanation:

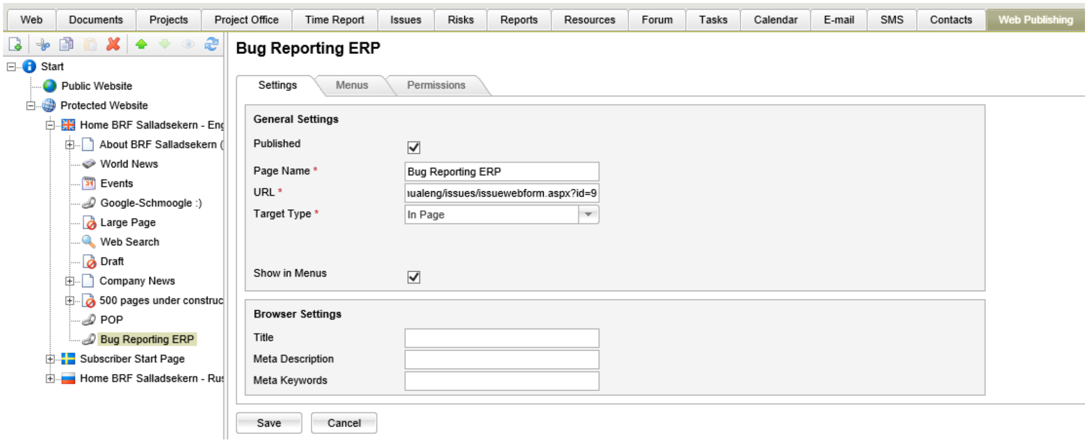
Field name	**Explanation**
Published	Shows if the link can be used or not
Name	Name of the form as displayed in the form list
Header	Text displayed as a header when published
Information	Text displayed below the header on a published form
Project	Project the form belongs to. Can be left empty.
Issue type	Issue type (controls which field that will be available)
Form Language	Language used for messages related to the form, such as button texts.
Active from	First date the form can be used
Active to	Last date the form can be used
Expired message	Text displayed to users when form is not active any longer
Response text	Text displayed to user after having saved an issue entry
Allow attachments	Option to allow attachments or not
URL	URL to be used when accessing the form. This URL should be copied when publishing the form.
Field selection	Fields available to display to users when adding issues via the form. The field selection depends on issue type.

By clicking on a selected field it is possible to set a default value. The value will be preselected when a user fills in the form. In the dialog window it is also possible to set an info text related to the specific field. The info text will be displayed when clickning on an “info” symbol next to the published field.



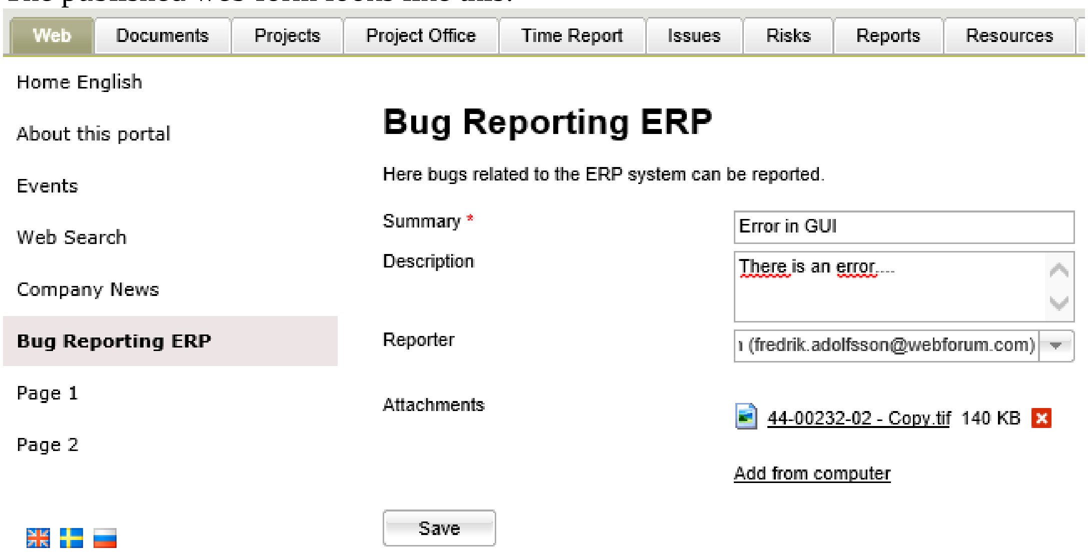
Edit field

In order to publish a form on a web page, copy the URL for the form and paste in the web publishing. This can be done by adding a new page of type “Link” and with target type “In Page”. Please observe that only publishing on internal web pages is supported for the time being.



Publishing an issue web form

The published web form looks like this:



Published web form