



Webforum

New Functions in Version 14.4

Last update: 2014-12-05

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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.

Start review

Type of review

Parallel

Serial

Select participants

Participants:

1. K. Fredrik Adolfsson (fredrik.adolfsson@aducera.com) ↑ ↓ ✕

2. Per Kallhaug (per.kallhaug@webforum.com) ↑ ↓ ✕

[Add](#)

Set due date

Due date:

Instructions to participant


Instructions:

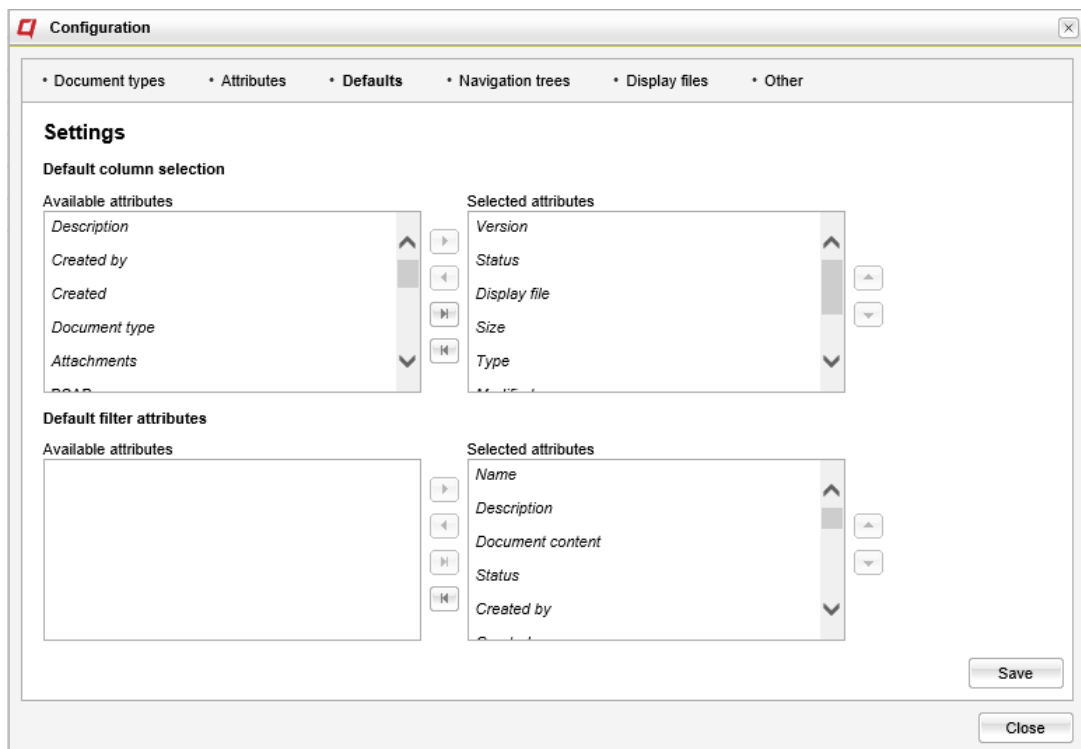
Supporting files: [Add from document archive](#)
[Add from computer](#)

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.

Saved search filters

Docs created this year ▼ ⚙

Search only in current folder
(Root/ERP Project/)

Name

Description

Document content

Status

 ▼

Created by

Created

 -

Modified

 -

Size

 KB - KB

Only lent out documents

Contract Date

 -

Contract End Date

 -

Contract name

Contract party

Contract type

 ▼

Contract value

 -

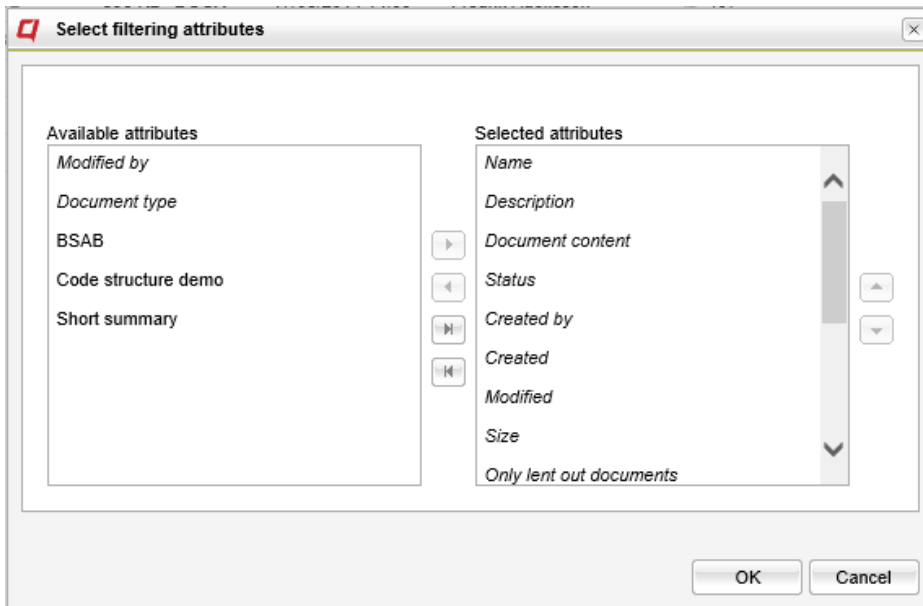
Country

 ▼
 ▼

Copy URL to Clipboard

Filters

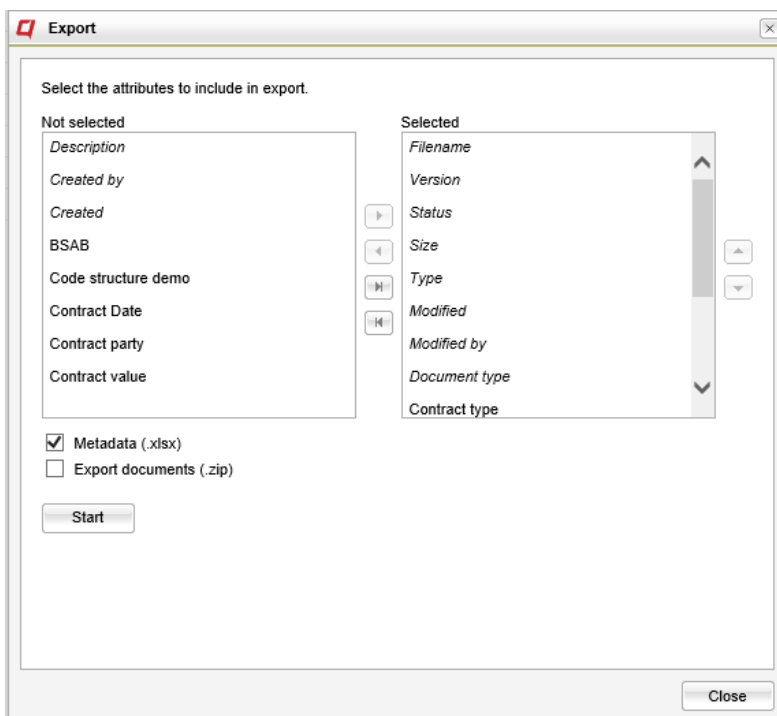
You will be given options to choose attributes to use in the filter panel.



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

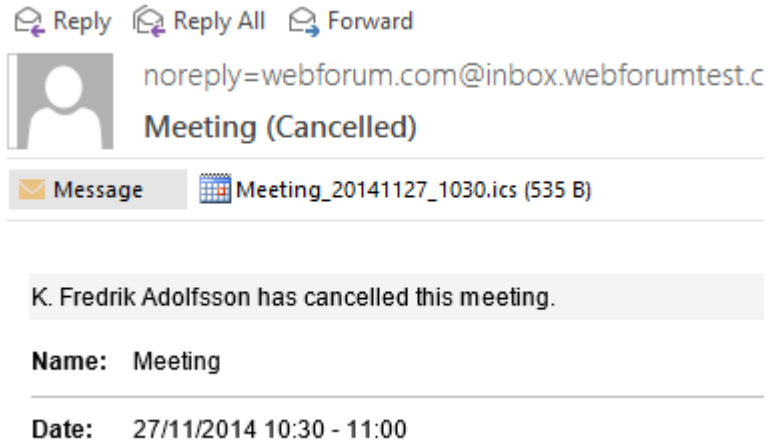
Last visited folder shown in the mobile interface.

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

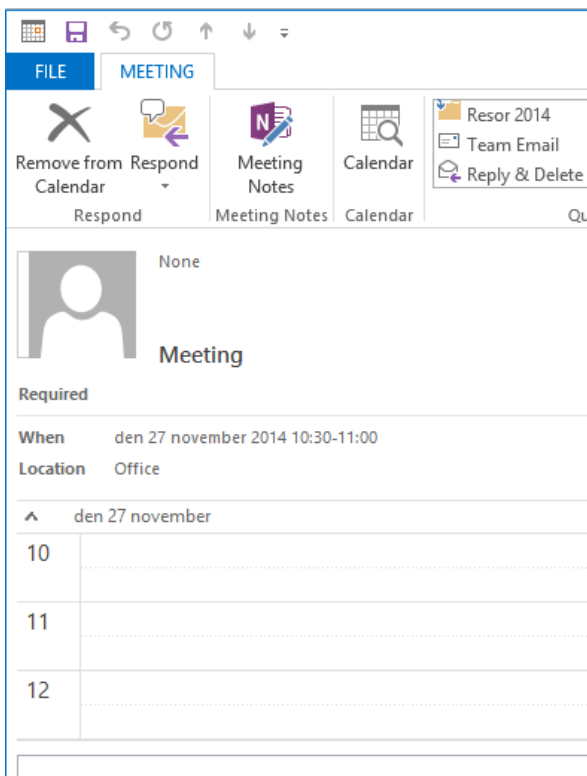
Calendar

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.

Projects

The screenshot shows a web application interface for project management. On the left, there is a 'Filters' sidebar with a search input field containing the text 'test'. Below the search field are buttons for 'Clear Filter' and 'Search'. The main area on the right displays a table of projects. The table has columns for 'Project', 'Customer', and 'Proj No'. A single project is listed with the name 'Fa test', customer 'Internal', and project number '2011'. The table also includes checkboxes and a dropdown arrow in the first column.

	Project	Customer	Proj No
<input type="checkbox"/>	Fa test	Internal	2011

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

Project / Resource		Start	End	Booking
<input type="checkbox"/>	Demo Project (Internal)			
<input type="checkbox"/>	Demo Project Sep 2012 (Internal)			
<input type="checkbox"/>	ERP (Internal)			
<input type="checkbox"/>	Adolfsson, Fredrik (fredrik.adolf...)	01/11/2012	31/07/2013	197.99 hr
<input type="checkbox"/>	Kallhauge, Per (per.kallhauge@web...)	01/11/2012	31/07/2013	0.00 hr
<input type="checkbox"/>	Project Manager	01/11/2012	31/07/2013	117.60 hr
<input type="checkbox"/>	Product Launch X (Internal)			
<input type="checkbox"/>	Adolfsson, Fredrik (fredrik.adolf...)	01/02/2012	27/03/2012	160.00 hr

2013					
Oct	Nov	Dec	Jan	Feb	
0.0	0.0	0.0	20.0	10.0	
	35.6	34.0	37.2	32.4	
	22.3	21.3	23.4	20.3	
	0.0	0.0	0.0	0.0	
	13.3	12.7	13.9	12.1	

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

From (%) To (%)

-

From To


-

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.

Users and Groups	Global Resources Details		
Users	Name *	Description	<input checked="" type="checkbox"/> Enabled
Special Users	<input type="text" value="Project Manager"/>	<input type="text"/>	
Groups	Resource Categories	Additional Resource Category 1	Additional Resource Category 2
Import Users	<input type="text" value="Employee"/>	<input type="text"/>	<input type="text"/>
Export Users	Job Role		
Workspace	<input type="text" value="Project Manager"/>	<input type="button" value="Back"/> <input type="button" value="New"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>	
Account			
Settings			
Login Log			
API			
Import from other systems			
Projectplace			
Project Management			
Resources 			
Global Resources Details			

Global resource details

This means that it will be easier to see both supply and demand in the Resource Utilization 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.

<input type="checkbox"/>	Name	Project	Issue Type	Active from	Active to	Created by	Creation date	Modi
<input type="checkbox"/>	Bug reporting ERP	ERP	Bug	27/11/2014	27/11/2015	Fredrik Adolfsson	27/11/2014	Fredr

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.

Issue Web Forms

Bug reporting ERP

Published

Name *

Header *

Information

B *I* U A A A ↺ ↻

Here bugs related to the ERP system can be reported.

Design HTML Preview

Project

Issue type

Form language

Active from *

Active to *

Expired message

Response text

Allow attachments

URL

Available fields	Data type
<input type="checkbox"/> Is Time Report Enabled	Boolean
<input type="checkbox"/> Percent Complete	Integer
<input type="checkbox"/> Start Date	Date
<input type="checkbox"/> End Date	Date
<input type="checkbox"/> UOM	Pick list (one choice)
<input type="checkbox"/> Time Report From	Date
<input type="checkbox"/> Time Report to	Date
<input type="checkbox"/> Budget	Decimal number
<input type="checkbox"/> ETC	Decimal number
<input type="checkbox"/> Severity	Pick list (one choice)
<input type="checkbox"/> Priority	Pick list (one choice)
<input type="checkbox"/> Found in release	Pick list (one choice)
<input type="checkbox"/> Fixed in version	Pick list (one choice)

Selected fields	Data type	Default value
<input type="checkbox"/> Summary	Text (single row)	
<input type="checkbox"/> Description	Text (multiple rows)	
<input type="checkbox"/> Reporter	User list (one choice)	

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:

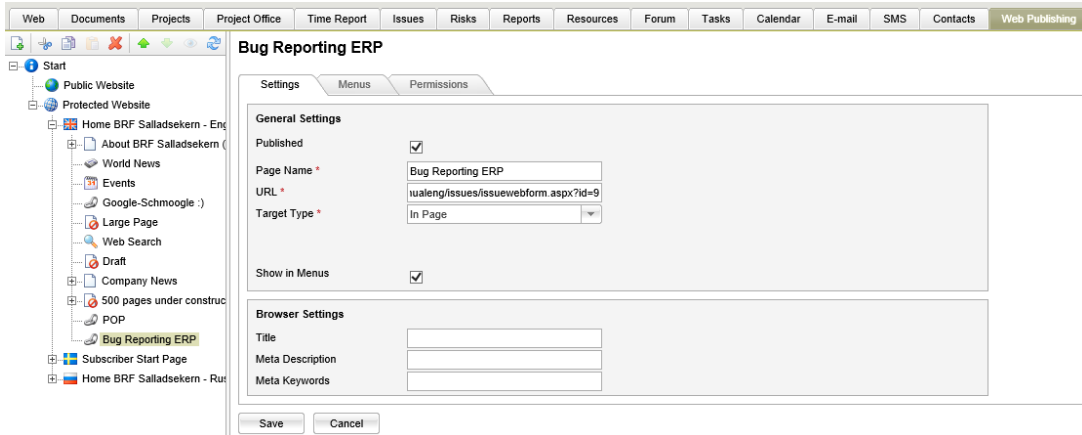
Field name	Explanation
Published	Shows if the link can be used or not
Name	Name of the form as displayed in the form list
Header	Text displayed as a header when published
Information	Text displayed below the header on a published form
Project	Project the form belongs to. Can be left empty.
Issue type	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 clicking on an “info” symbol next to the published field.

The screenshot shows a software interface with a table of fields. The table has three columns: 'Selected fields', 'Data type', and 'Default value'. The 'Reporter' field is selected. A dialog box titled 'Manual Eng - Edit field' is open, showing the configuration for the 'Severity' field. The 'Field' is 'Severity', the 'Default value' is '4 - Low', and the 'Information' is 'Information text'. The dialog has 'OK' and 'Cancel' buttons.

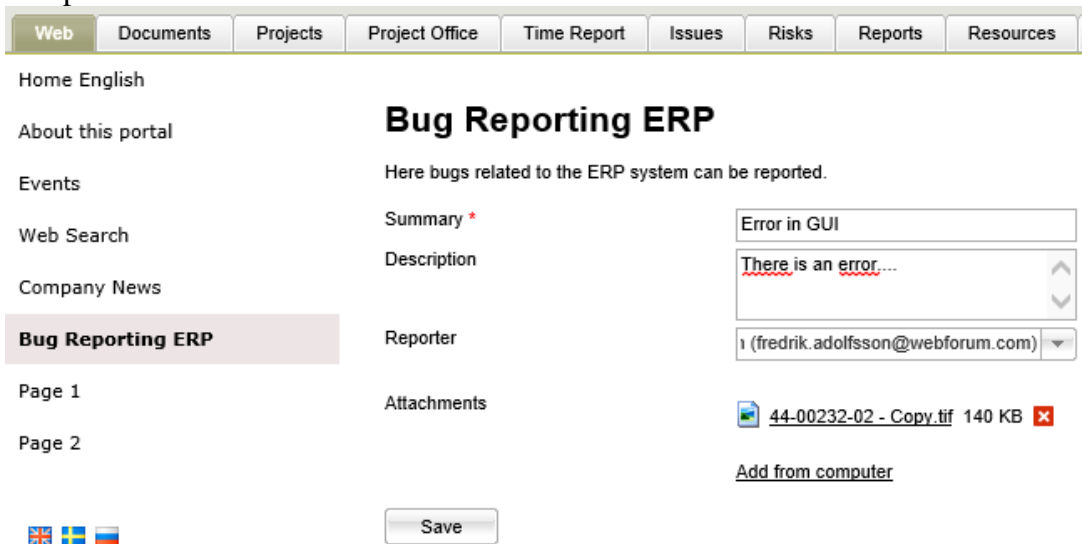
Edit field

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