Webforum

New Functions in Version 15.2

Last update: 2015-06-23

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About this document

This document describes the main new functionality in the Webforum 15.2 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
Start page	New dashboard displayed to users when they log in.
Documents	Possibility to allow a document to be updated during a review
	New quick list that shows all locked documents
	Set metadata during replace
	Logging
Project Management	Project permissions
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Issue management	Issue fields setup
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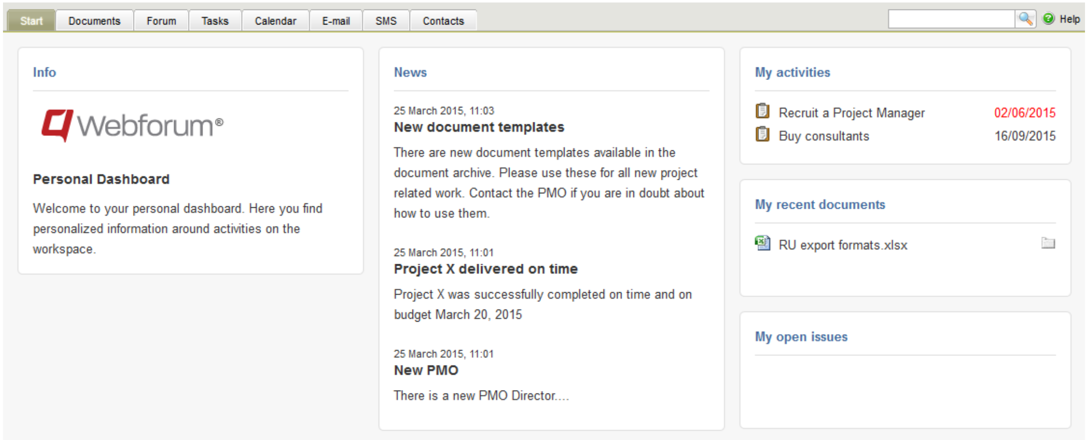
Start page / Dashboard



The system now has a new start page module. (This module has not been turned on for most existing workspaces. Contact Webforum or your Webforum reseller to have it turned on.) This start page is the first page that a user sees when they login to Webforum. It has widgets for information from the workspace administrators and widgets that display information relevant to the user such as tasks assigned to the user or the user's recently opened documents. Administrators can decide which widgets are displayed on the workspace.

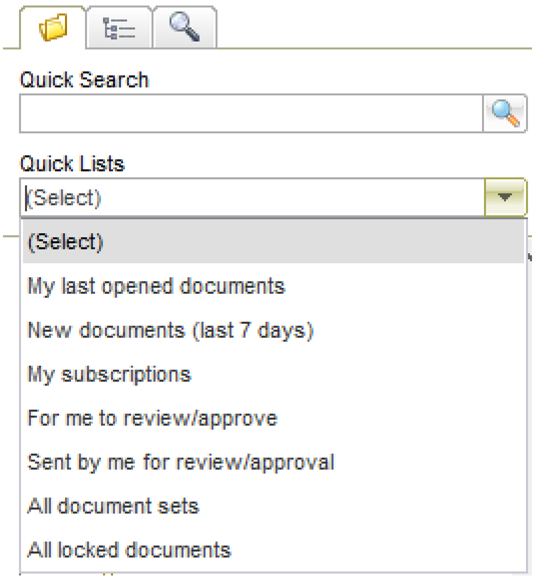
Documents

Allow documents to be updated during a review

When a review is started it is possible to specify that the document is allowed to be updated. If it is it will remain unlocked during the review (except when someone updates it). Otherwise it will be locked. Documents are always locked during approvals.

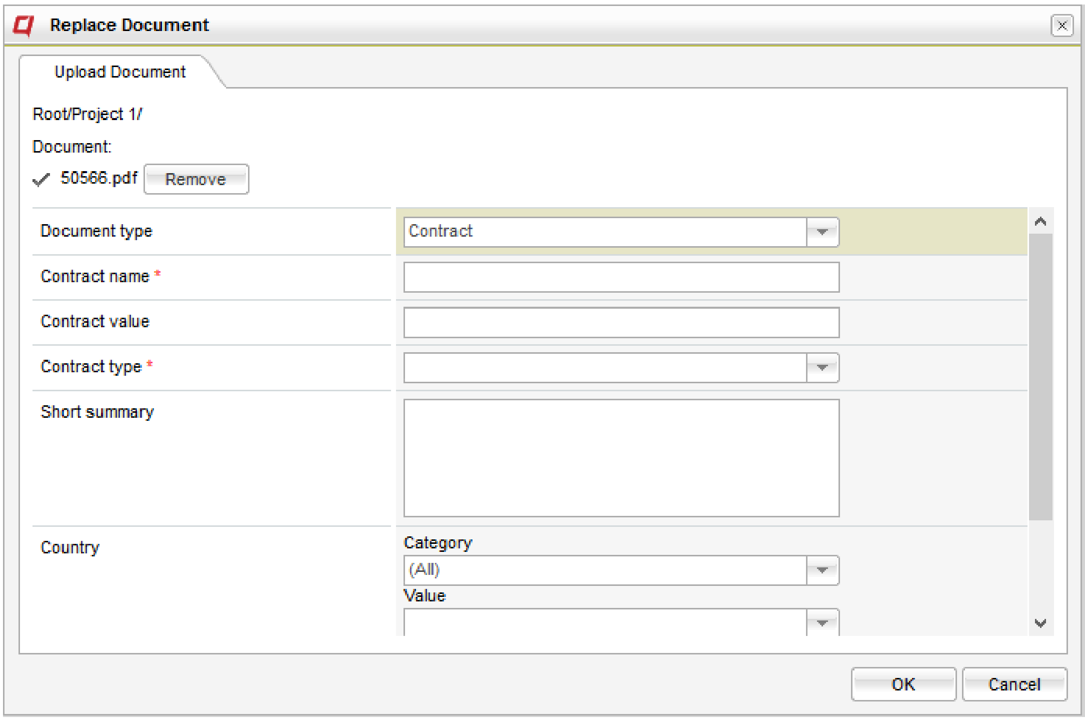
New quick list with all locked documents

There is a new quick list that shows all the workspace's locked documents.



Set metadata during replace

It is now possible to update a document's attribute values when it is replaced (using Replace from the document menu).



Logging

Locking/unlocking and lend/return are now logged for documents and displayed in the document log.

Project Management

Project permissions

The permission setting possibilities for projects have been substantially enhanced. A complete new model for permission setting has been introduced. As an administrator you now can give users or groups individual permissions to the different tabs in the project. The setup is done on project level.

There are three permission levels for the tabs

- No access: The tab is not visible to the user
- Read: The tab is visible and the data in the tab is possible to read.
- Edit. The tab is visible and the data is the tab is possible to edit.

The reports tab only have No access and Read available.

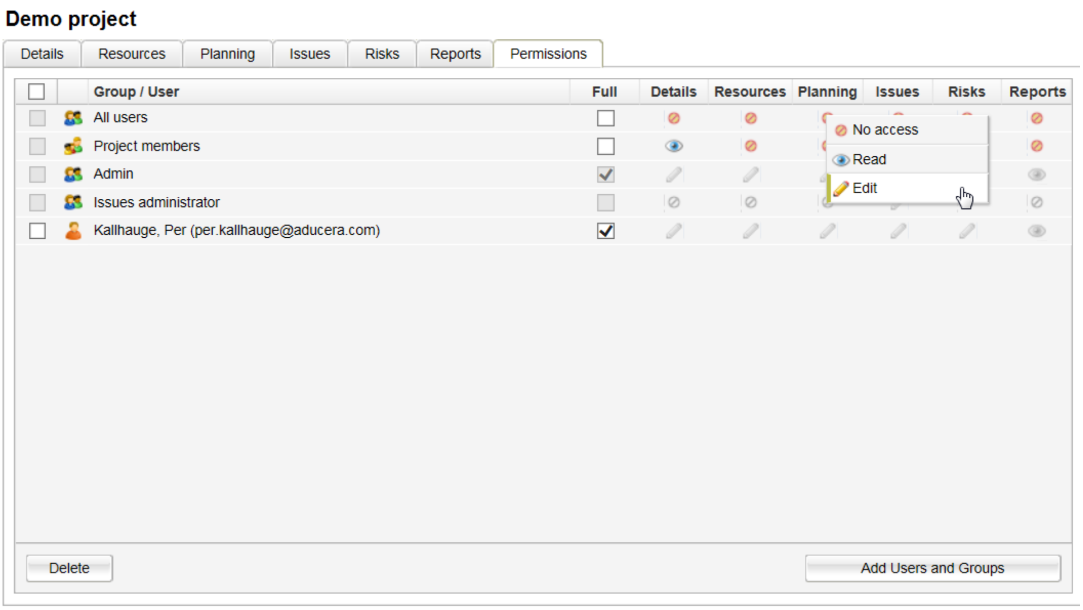
The permission Full automatically gives highest permission level on the individual tabs.

Users with permission Full have permission to access the Permissions tab and set the permissions.

The All users group can't be removed from the table. The permission setting can, however, be set in any combination.

The Project members group contains all resources assigned to current project. The resources are administrated in the Resources tab.

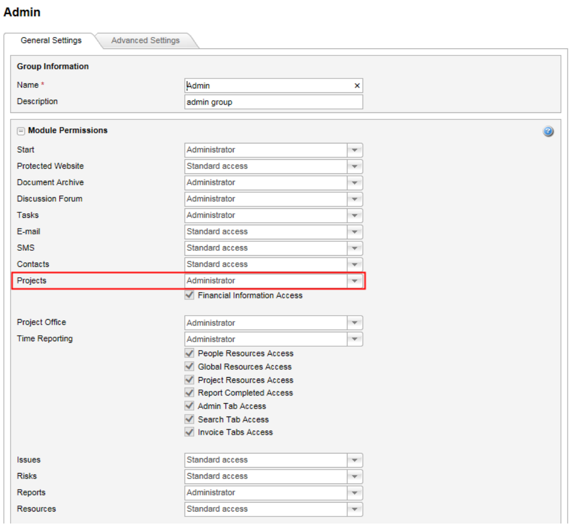
Groups with access to the project via module permissions are displayed with a disabled look. The only way to remove them is to change the module permission for these groups in the Admin tab / Groups / Module permission. Further details below.



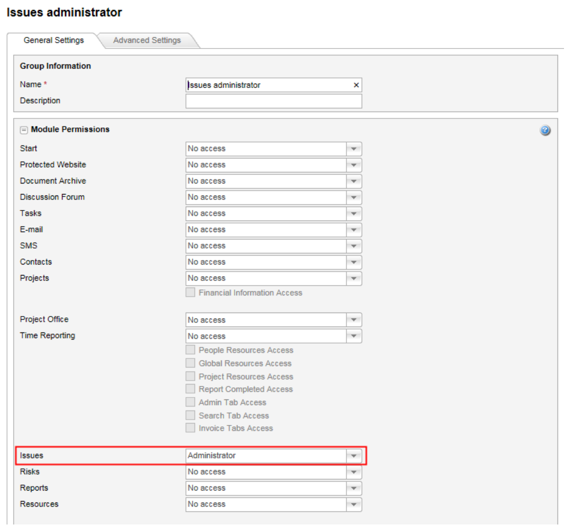
The permissions tab

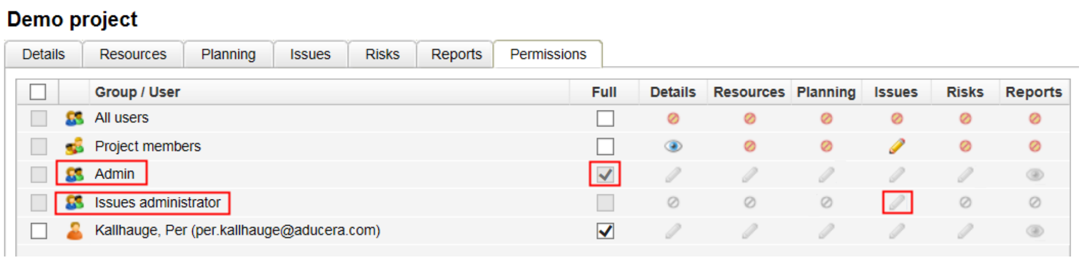
Some administrator permissions setup on Group / Module permission level gives permissions to all projects on the workspace.

Module permission Projects = Administrator gives the permission Full for all projects on the workspace.



Module permission Issues = Administrator gives the permission Edit on the Issues tab for all projects on the workspace.





Permission setting through module permissions

There are two security levels for projects.

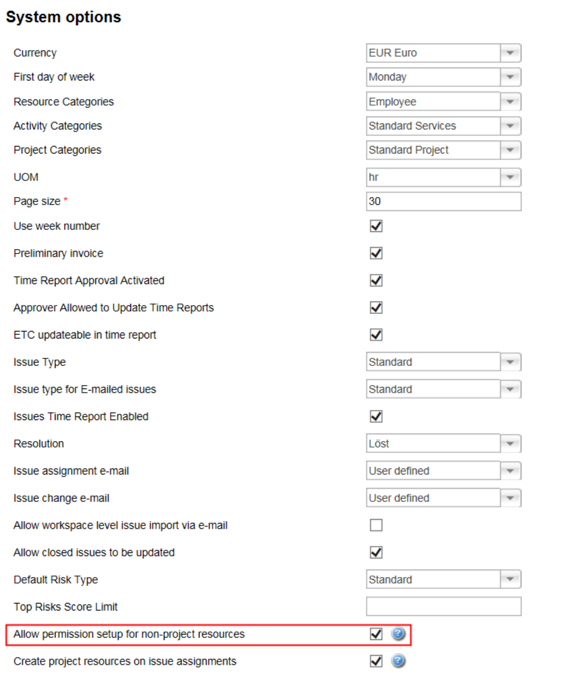
Standard security:
The project administrator has the possibility to grant permission to the project to all users and groups on the workspace with no restrictions.

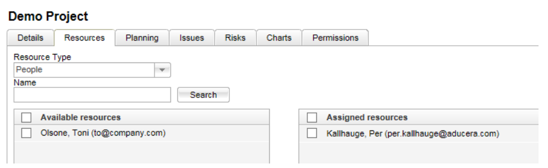
Rigid security:
The project administrator has the possibility to grant permission to project resources only. A user need to be added to the project resouces list in the Resources tab in order to get access to the project.

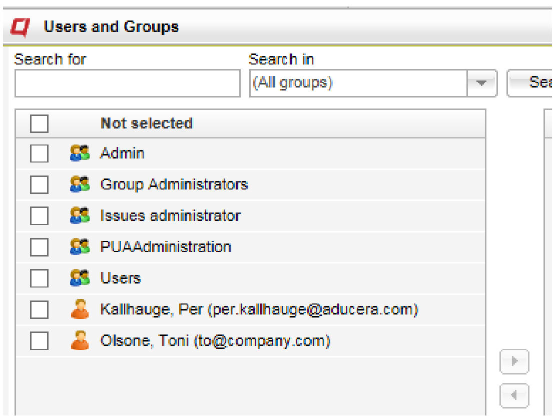
In both cases, groups with administrator permissions will have access to the projects. See above for more details.

The security level is controlled on workspace level, by the System Options parameter Allow permission setup for non-project resources.

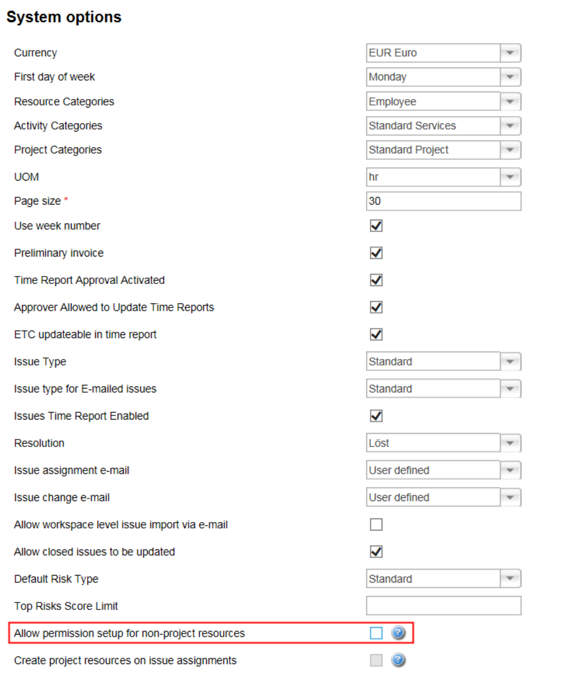
Standard security

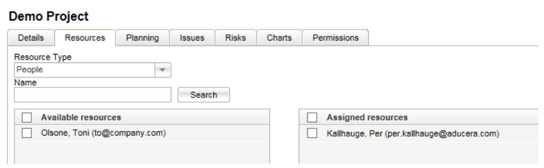


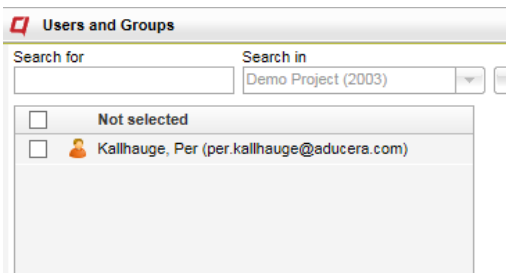




Rigid security



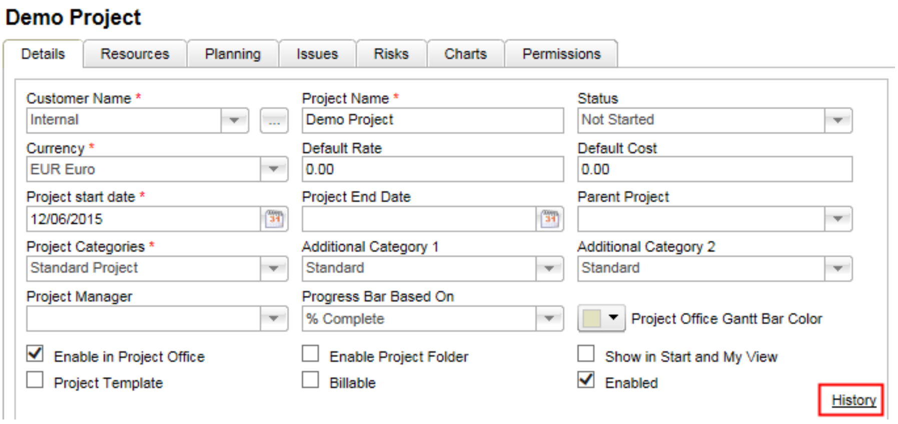




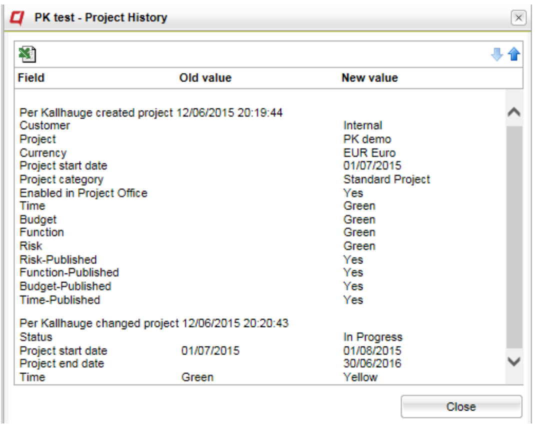
Project security level setting

Project history

Parameter changes on the Project Details tab are stored in the database. The change record can be accessed through the History link on the Project Details page. Click on the link to open the Project History dialog.



Link to the history dialog



History dialog

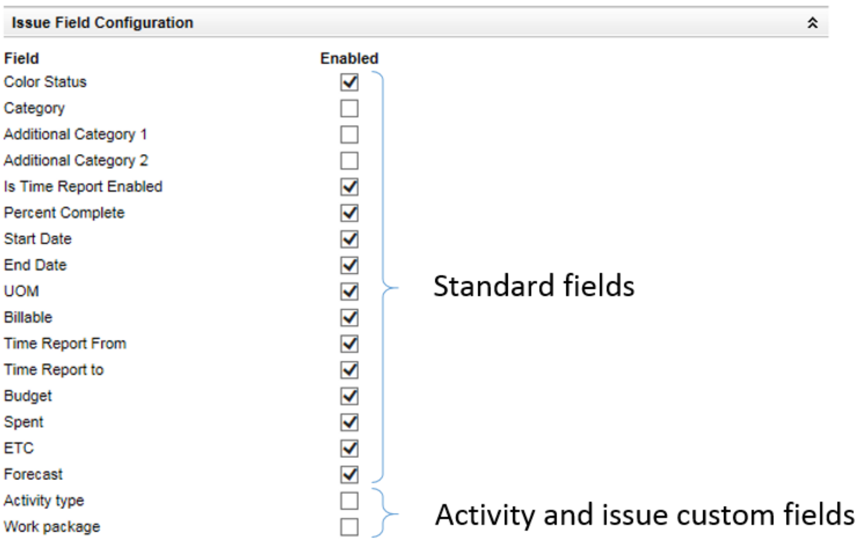
Issue management

Issue fields setup

Many fields are common for issues and activities/tasks in planning. This gives the opportunity to control and follow up issues and activities/task in a common way.

For users with no need of these possibilities, it is now possible to turn off a number of fields in the issues module.

Both standard fields and Activity and issue custom fields can be configured to be displayed or not. Each field can individually be turned on/off.



Configurable fields

Default filter in issues

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

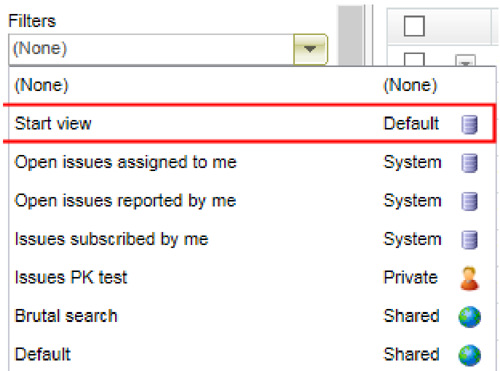
The default filter controls how the list is setup and which data is displayed **the first time** the user accesses the list. The next time the user returns to the list, the display will be the same as when it was left. The default filter is available to all users to be used at any time.

There are different default views for the issues tab on top level, and for the issues list for each project. Max one default view can be created for each place.

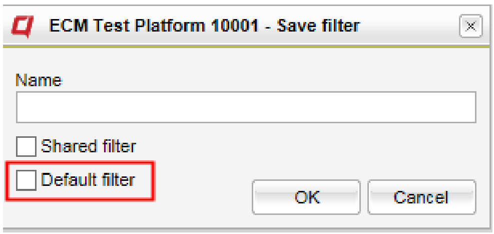
The default view have the same flexibility in setup as other user defined filters.

Permission required to set up a default filter.

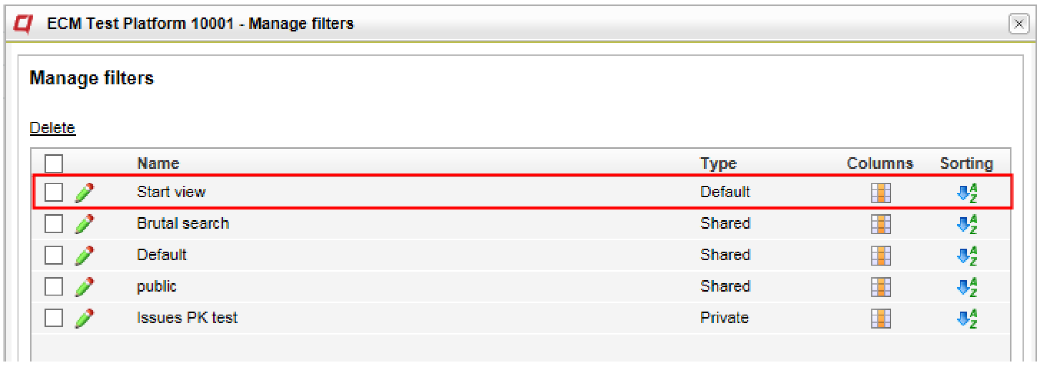
- Top tab level: Issues module permission = Administrator
- Project level: Permission = Full



Filter selection list box



Save filter dialog



Manage filters dialog

Issue creation notification e-mail

There is now support for setting up e-mail notifications for new created issues.

An e-mail is sent to selected recipients when a new issue is created.

The distribution lists can be setup on issue tab level and for individual projects. Lists on project level only controls distribution related to specified project.

Lists on issue tab level can be setup to include issues with no project connection and/or with project connection (all projects then included).

The e-mail distribution is controlled by object permission. The user needs read permission to an issue to receive the e-mail

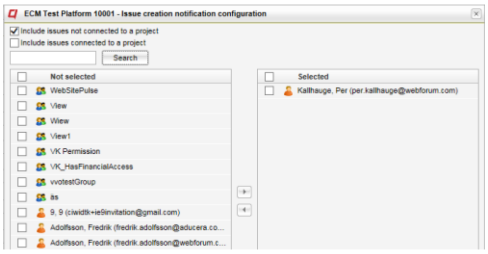
The e-mail is immediately sent when the issue is created.

Click on the Gear icon opens the Configuration dialog. The administrator can select which users that should receive an e-mail when a new issue is created. The two check boxes above the search field is only available in issues tab level.

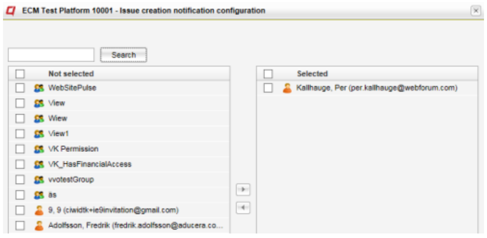
Permission required to set up issue creation notification e-mail lists

- Top tab level: Issues module permission = Administrator
- Project level: Permission = Full

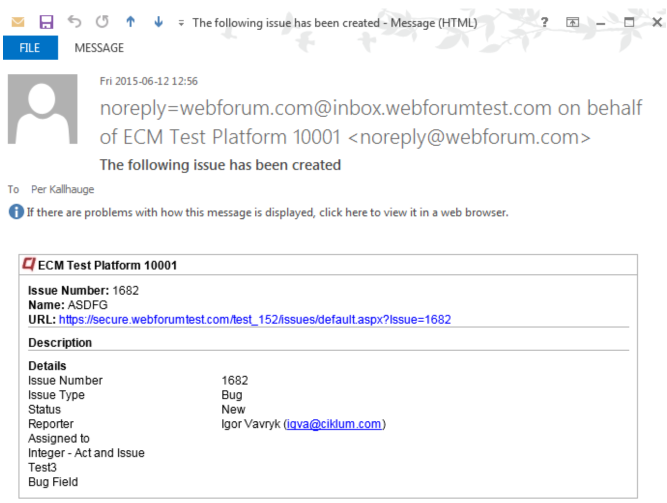
Issue list toolbar



Setup dialog for issue tab level



Setup dialog for projects



Notification e-mail

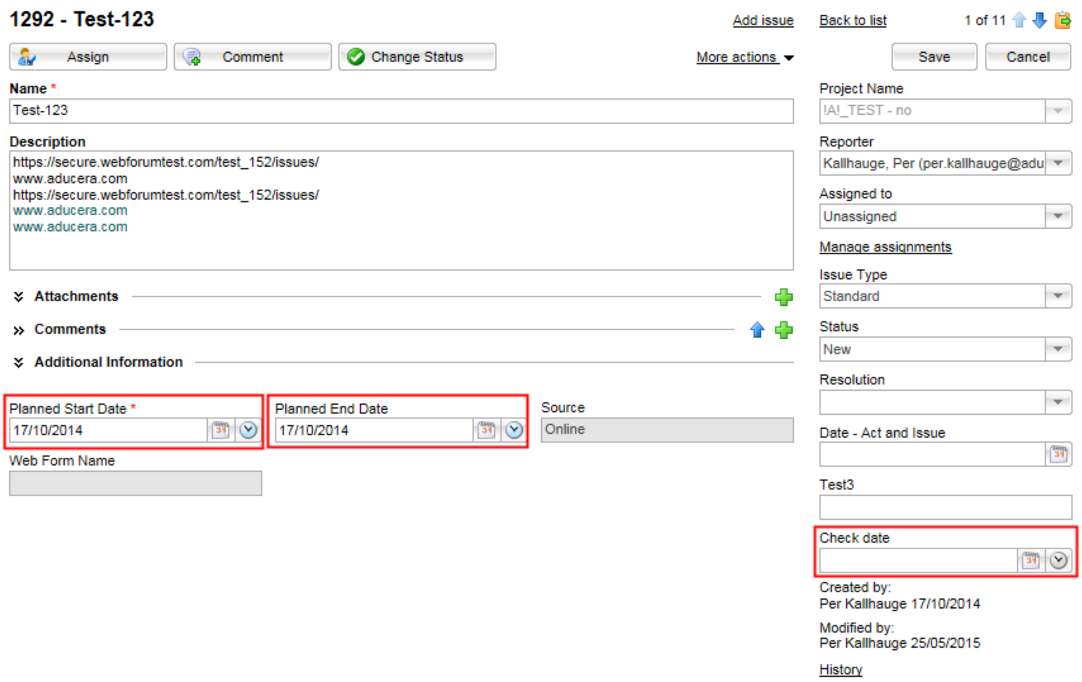
Issue reminders

There is now support for date controlled e-mail reminders for issues.

When the specified date is reached, a reminder e-mail is sent to the specified recipients. Reminders are not sent for closed issues.

Reminders can be defined for the following fields

- Planned Start Date
- Planned End Date
- All Issue Type specific custom fields



Setup is performed through the clock icon on the related field. The reminder date calculation is based on the selected date in the field.

The icon is disabled if no date is selected. A base date is always required to setup a reminder.

The icon is blue if there is a date in the field, but no reminder is defined.

The icon is amber if a reminder is defined.

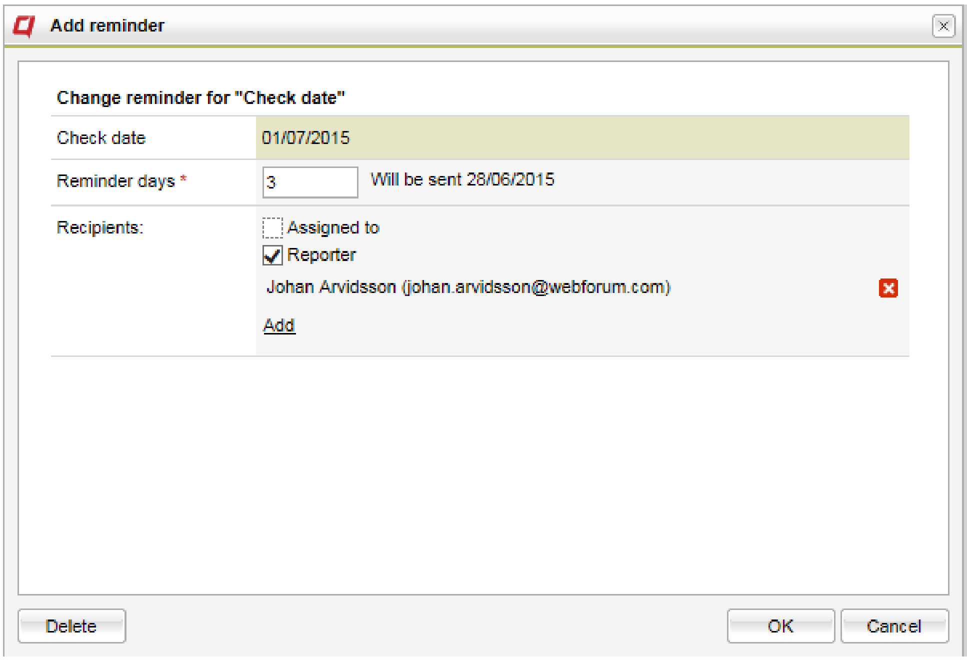
Click on the clock icon opens the reminder dialog.

Reminder days contains the number of off-set days from the date specified in the field the reminder should be sent. The system calculates and displays the distribution date.

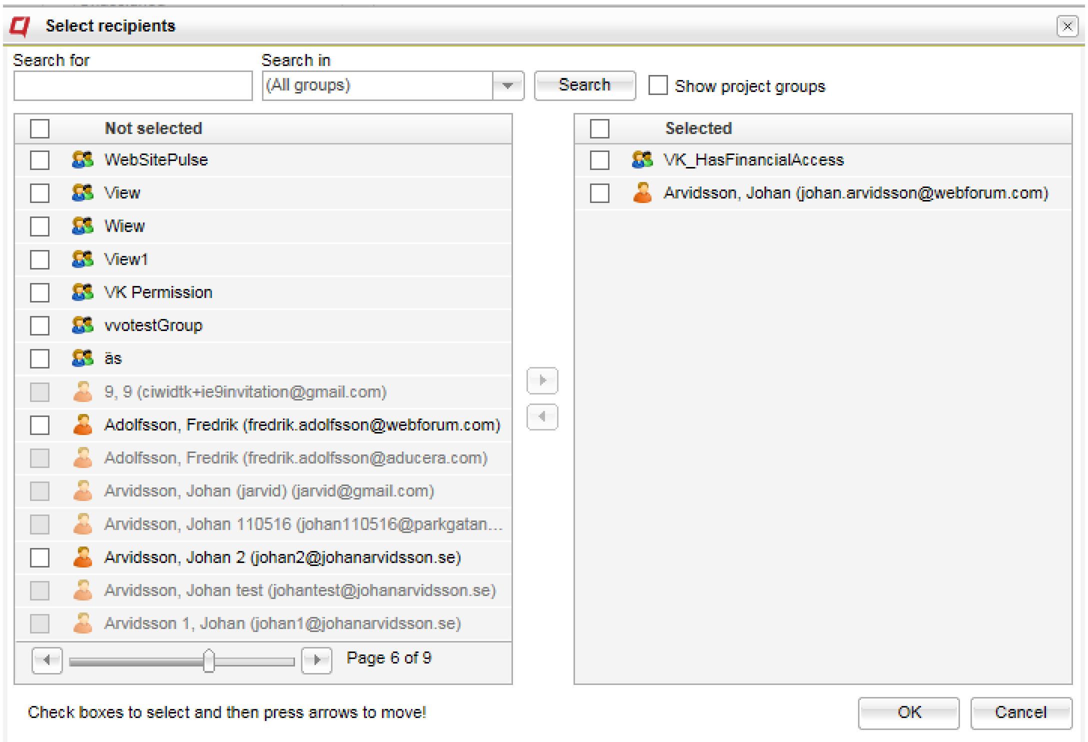
The reminder can be sent to any combination of Assigned-to, Reporter and any users or groups. Assigned-to is default selected.

The Add link opens the user selection dialog.

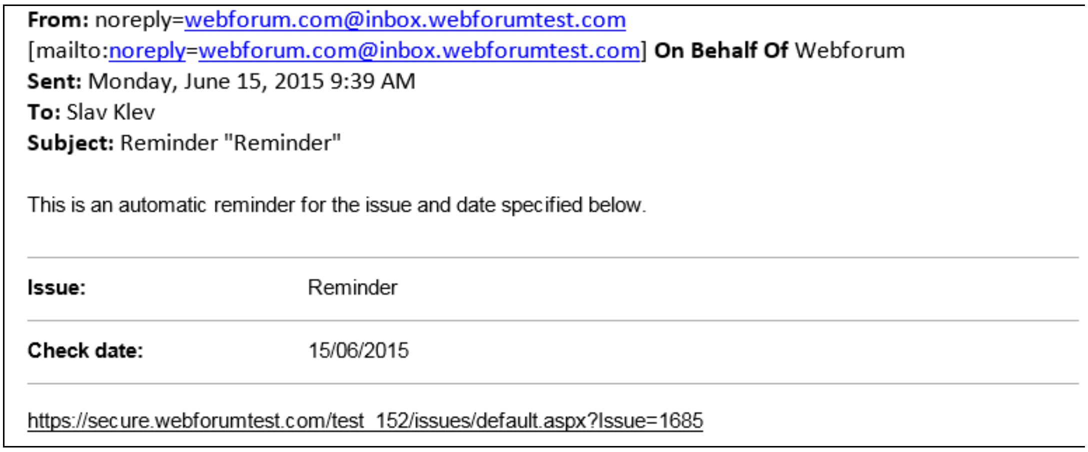
The entire reminder is deleted with the Delete button.



Reminder dialog



User selection dialog



From: noreply=webforum.com@inbox.webforumtest.com [mailto:noreply=webforum.com@inbox.webforumtest.com] **On Behalf Of** Webforum
Sent: Monday, June 15, 2015 9:39 AM
To: Slav Klev
Subject: Reminder "Reminder"

This is an automatic reminder for the issue and date specified below.

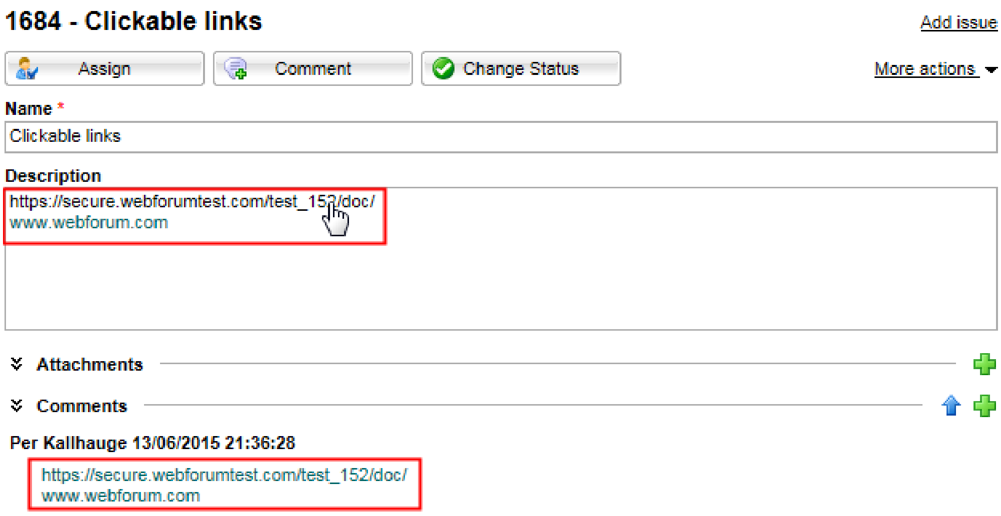
Issue:	Reminder
Check date:	15/06/2015

https://secure.webforumtest.com/test_152/issues/default.aspx?Issue=1685

Reminder e-mail

Clickable links in issues

Text in the description and comments fields that the system consider being a web address is made clickable. When clicked on, a new tab is opened with the web address selected.



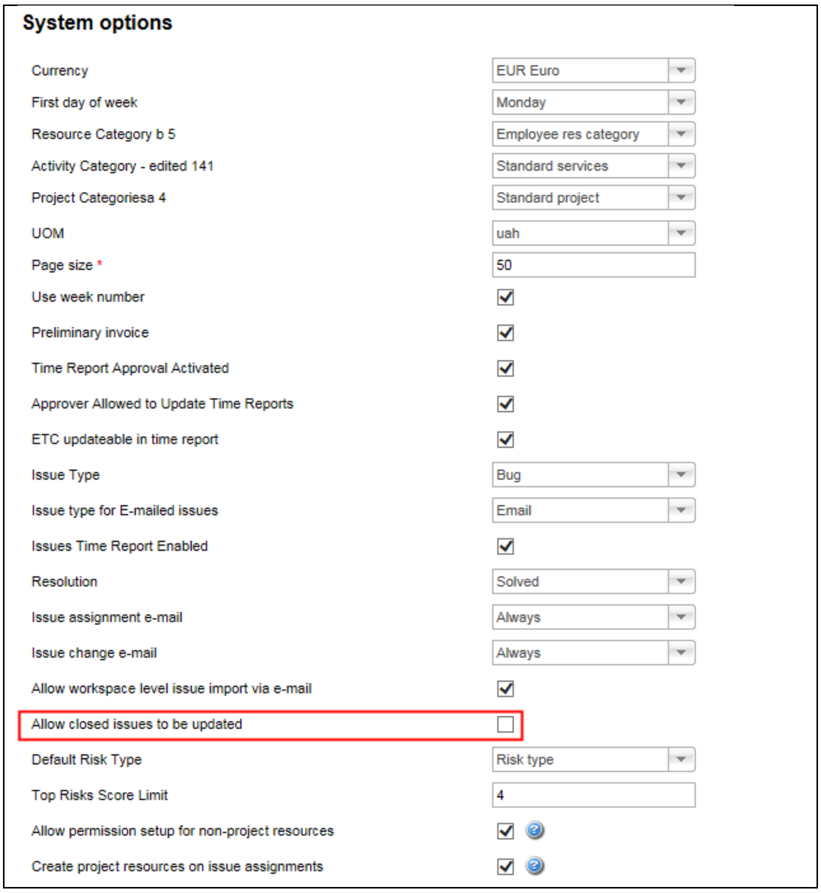
Issue details

Option to make closed issues non-updatable

There is an option to make closed issues non-updatable.

It is controlled by the System option parameter Allow closed issues to be updated. The setting is done on workspace level.

When update is not allowed, it applies to all users, including administrators.

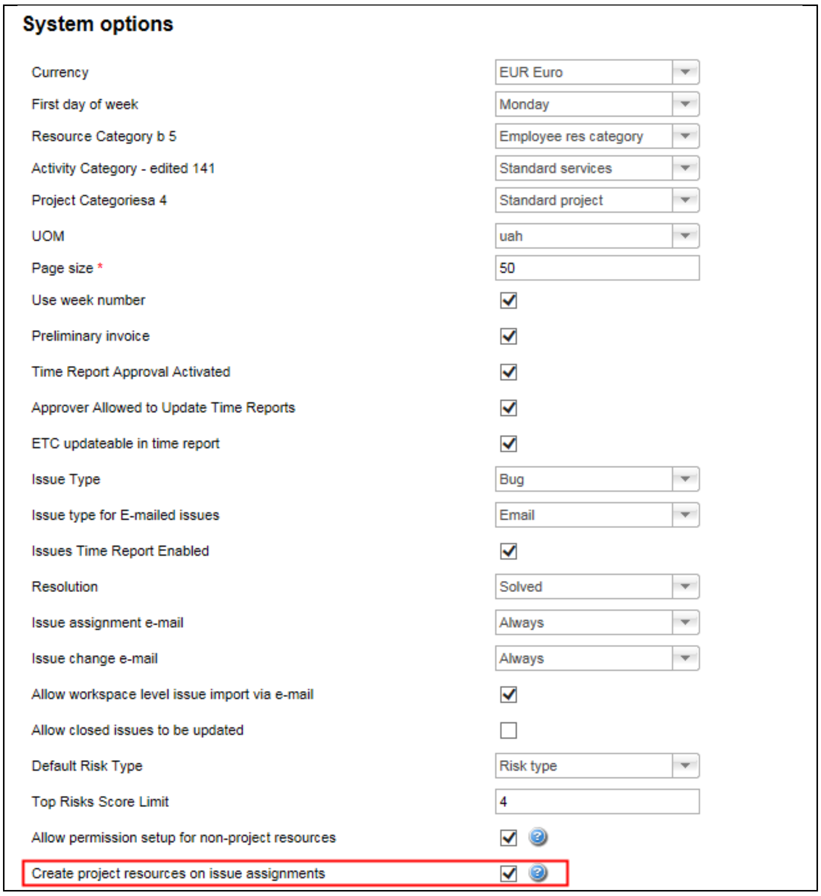


Setup parameter in System options

Create project resources on issue assignments

When set, a project resource is automatically created on the project of the issue if it does not already exist.

If not set, assigning a project issue to a user that is not a project resource is not permitted.



Setup parameter in System options

Project field not displayed in issues

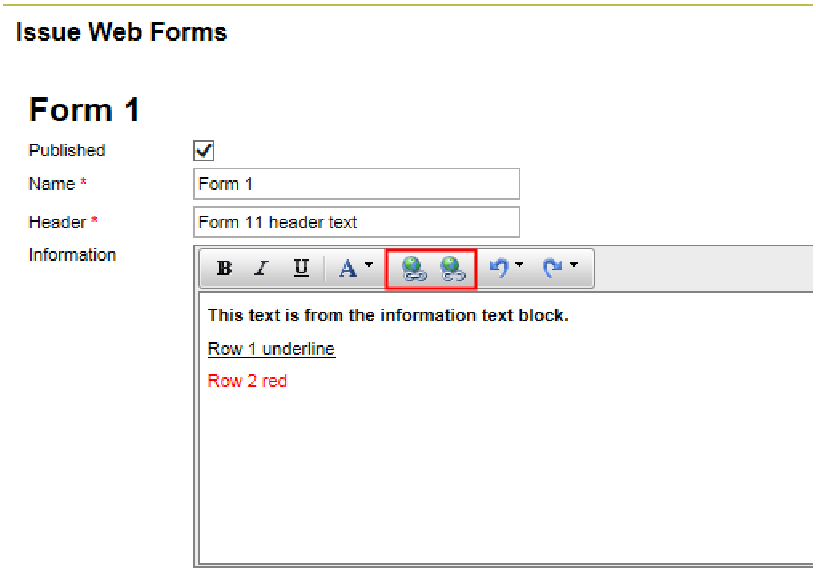
If there are no projects defined on the workspace, the project field is not displayed in the issues module.

Issue type not displayed in issues

If there is only one issue type defined on the workspace, the issue type field is not displayed in the issues module.

Links in the issue web form toolbar

It is now possible to define clickable links in the Information field in issue web forms.



Issue web form setup