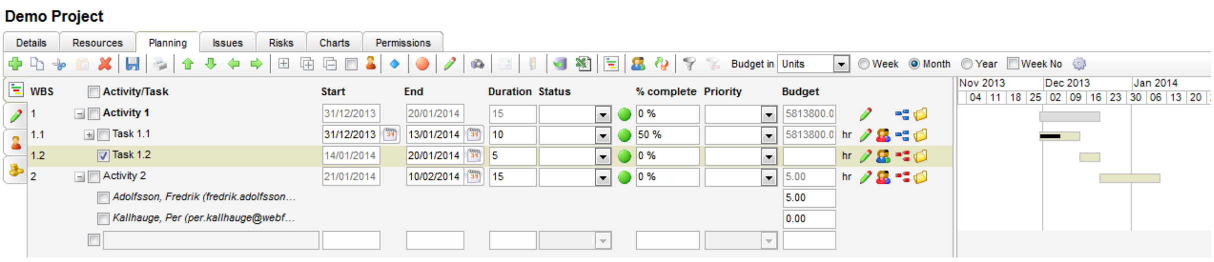
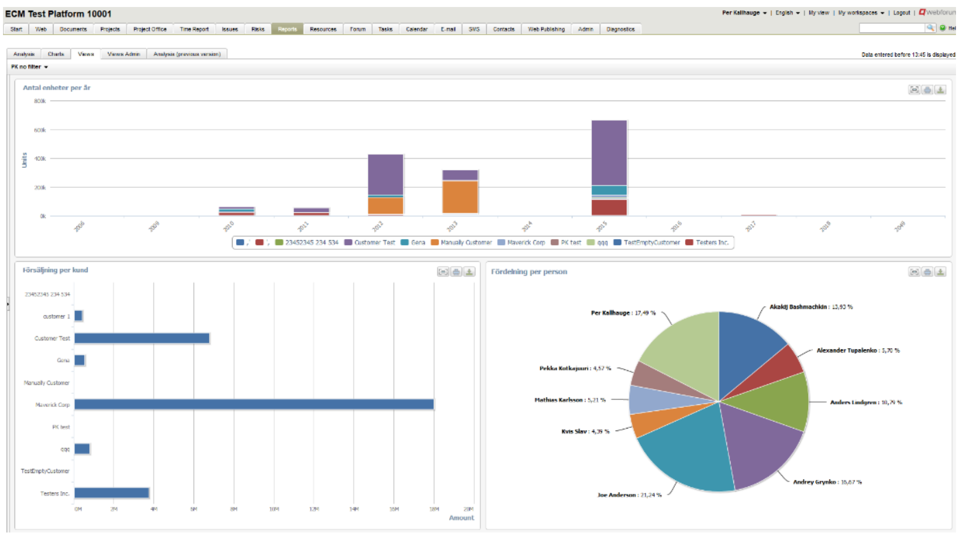
# Webforum Project Management

## User and Administration Manual



# Contents

# Webforum Workspace - Introduction

## *Introduction*

Webforum is an Internet-based work and communication Workspace, specially conceived to assist members of a group, such as a company, organisation, society or a project team, to cooperate and/or to disseminate information. The Project Management Module is used for project planning, time reporting and follow-up. The module can also be used as a basis for customer invoicing. This manual is only covering these parts of the system and should be read together with the Webforum Teamwork/Professional manual.

The Project Management module is designed to meet requirements for handling both small and large projects as well as project portfolios. This means that the module has a large set of configurable items. Most of the configurable items have default settings meaning that users do not have to change them, but some items should be configured properly in order to use the full potential of the system. It is therefore recommended that at least the administrator takes some time to read this manual thoroughly or participates in Webforum-led training. The manual gives an overview of the different tools and functions of the Workspace from a User and Administrator perspective.

The Webforum Workspace is made available by Webforum Europe AB (www.webforum.com) as an ASP-service and includes all required software and hardware, as well as server space and Internet connection for efficient operation. In addition, Webforum is responsible for maintenance, back-up and other services. The Workspace is made available to Workspace Operators on a license basis. The Terms and Conditions for using the Workspace are outlined in the **Operator Agreement.** Please make sure to have read and understood the terms and conditions stated in this Agreement.

Each Workspace has one or several Administrators, which are appointed by the Workspace Operator. The Administrator is responsible for setting up the Workspace, for inviting users to the Workspace and for assigning limitations for users to access the Workspace. A detailed description of the administration of the Workspace is given in the Administration and Set Up sections of this manual.

*Only the Administrators can give users permission to access the Workspace or to use its different tools and functions.*

### *Logging in*

The Workspace can be accessed using standard web browsers such as Microsoft Internet Explorer and Firefox. In order to use all the Workspace functions in an efficient way, version 11 of Microsoft Internet Explorer and the latest version of Firefox are recommended. Login information, which is provided by the Workspace Administrator, is personal and may not be passed on to others. Make sure to store this information in a secure location.

Type the web address (URL) of the Workspace. You will come to a login window. Click *Login* in the menu to access the login page.

Enter your ***Username*** and ***Password***. If the Workspace is provided with multi-lingual access, you can also select a Workspace language. Finally press *OK*.


*Webforum login window*

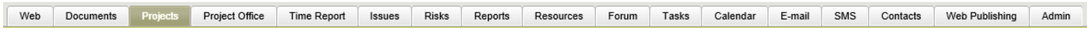
### *Multilingual Workspace*

The Workspace is available in several languages. A drop down menu is available, from where you can select your preferred language.

*The language setting applies only to system information, such as menus and functions, comments and auto-generated messages but does not affect the contents stored on the Workspace.*

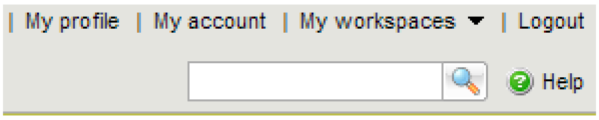
### *Layout of the Workspace*

The Webforum Project Management modules are accessed by pressing the Projects, Project Office, Time Report, Issues, Risks, Reports and Resources tabs within the workspace. In order to be able to do this, the user must belong to a group that has module rights to these modules. Please see the administration section of the Teamwork manual for details about Group set up. There is also a section about Groups under the Admin heading in this document.




For other tabs and a detailed explanation of the header row functions, please also see the Webforum Teamwork manual.

On the header row, links to logging out, to the manual, and to user-related information can be found. The header row also shows the name of the user who has logged in.




You should click *Logout* in the Header area whenever you wish to leave the Workspace, in order to prevent anybody else from accessing the Workspace without logging in.

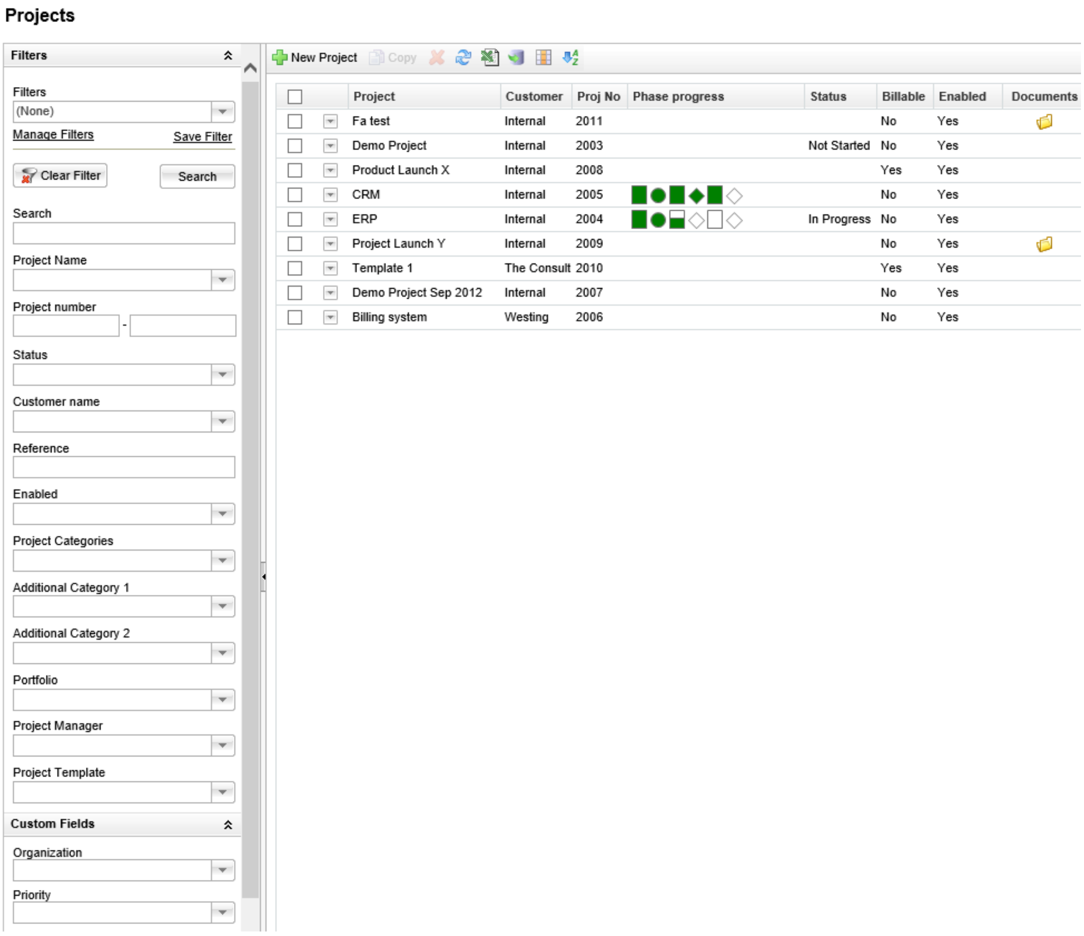
*You will be logged off automatically after 120 minutes of inactivity.*

# Projects

This is where projects and project activities are added, planned and controlled.

## *Project Listing*

When clicking on the Projects form, you will come to a list of projects. Here you can choose to search for projects that meet different search criteria and open them, add new projects, copy an existing project, import a project, delete a project or export project information. By default, they are sorted by Last Opened date. Any filter or sort order setting will be remembered the next time you come to this list.

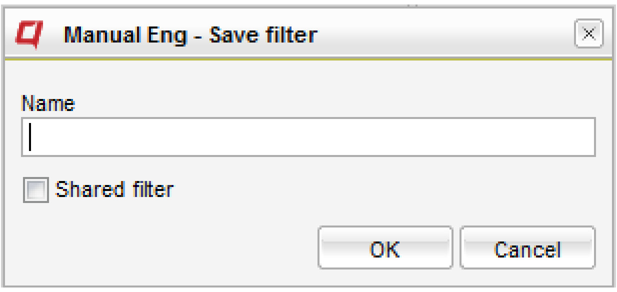



*Project listing*

The “Search” field is a free text search covering most of the fields available, including custom fields.

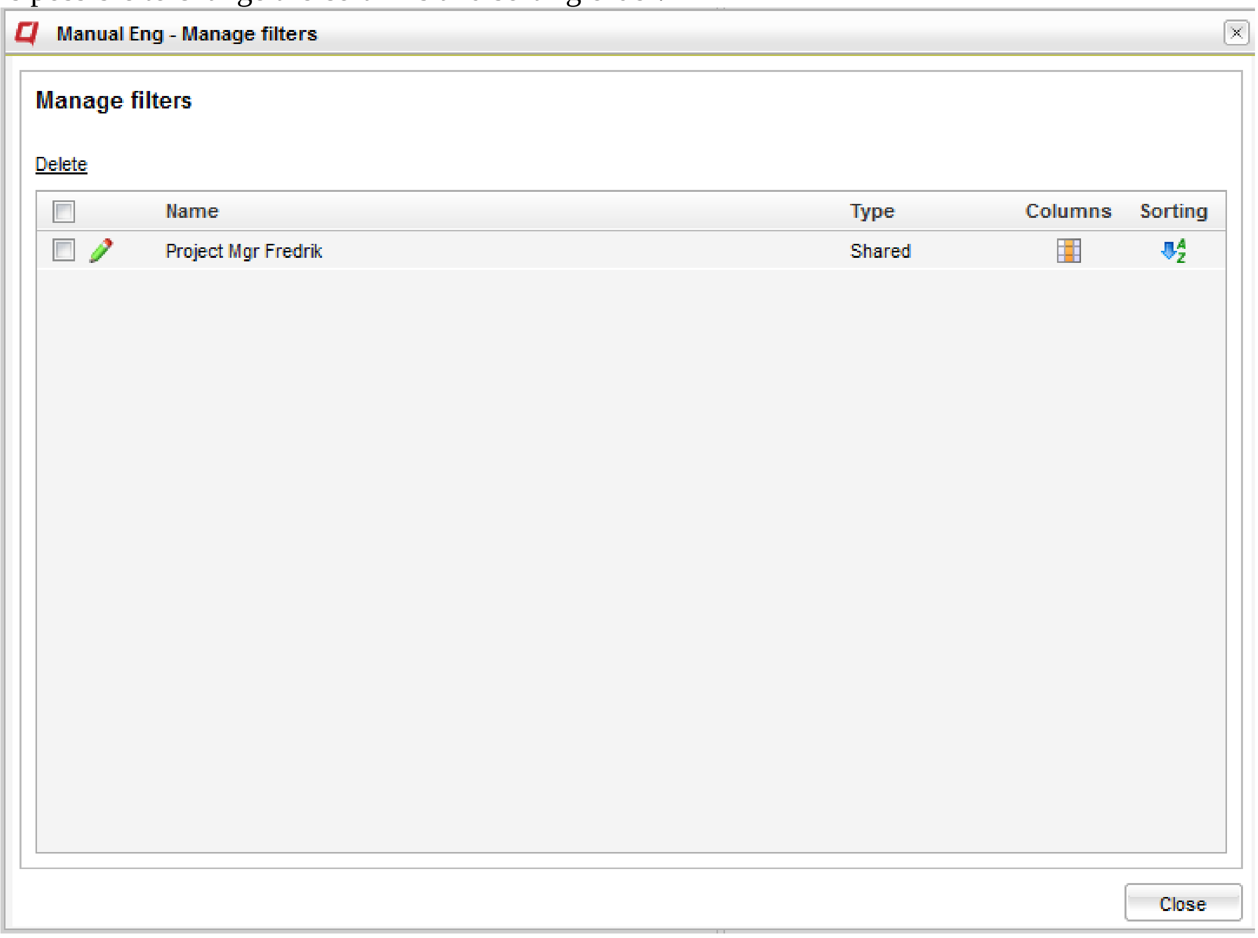
## Filter

It is possible to save different filters by clicking “Save Filter”. When saving a filter, it is possible to choose the “Shared filter” option so that others can use the filter. Project level permission settings will still be applied for each specific project shown in the list.




*Save filter*

Filters are managed by clicking “Manage filters” in the filter pane. For each filter it is possible to change the columns and sorting order.




*Manage filters*

## Toolbar


The toolbar has the following functions:

| | |
|---|---|
| New Project | New Project |
| Copy | Copy |
| | Delete |
| | Mass update |
| | Refresh the screen |
| | Export |
| | Import |
| | Column selection |
| | Sorting |

**New Project -** creates a new project from scratch or based on a project template.

**Copy** – Copies a marked project.

**Delete** – Deletes a marked project.

**Mass update** – Project attributes can be updated for many projects at the same time. Select the projects that should be updated. Click on the pen icon in the toolbar. The mass change dialog opens. Make the changes and save.

**Refresh** – Refreshes the screen.

**Export** - Exports what is currently displayed in terms of projects and attribute fields. There is an option to include information about resources as separate rows – one row per project and resource.

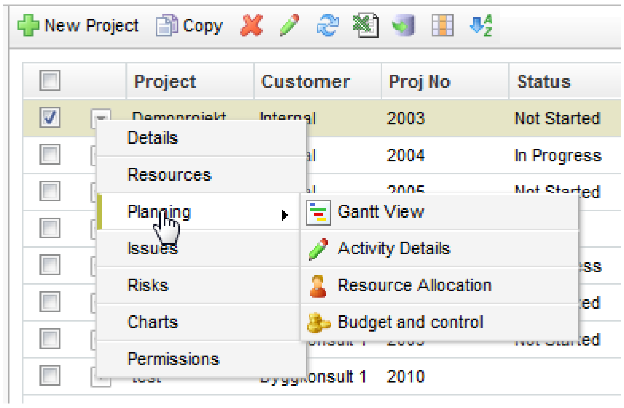
**Import** – Imports a project, see details below.

**Column selection** – it is possible to choose which columns to display in the grid.

**Sorting** – it is possible to choose sort order. Sorting can be made on more than one field and the sort order is based on the order which the fields are displayed in.

## Context menu

From the context menu it is possible to navigate directly to the project tabs.

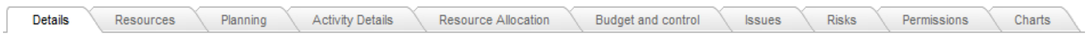



*Context menu*

Please note that Projects with time reported cannot be deleted. First, all time reported must be deleted. Use the Search time report or Reports & Analysis functions in order to find out which persons and which dates that have time report on them. Invoiced and approved time cannot be deleted.

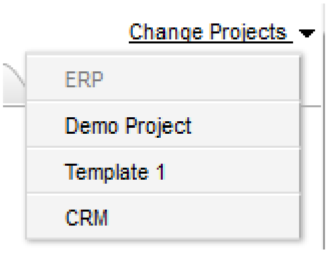
## New Project

If you click new, a new project will be created and you will come to the Project tabs where you manage all information about the project. Read more about project tabs below.




*Project planning tabs*

Above the planning tabs, there is a “Change Projects” option. This field makes it possible to navigate directly from a specific tab for one project to the same tabe for another project. The list contains all the projects that you have opened the last 60 days in a reversed chronological order.

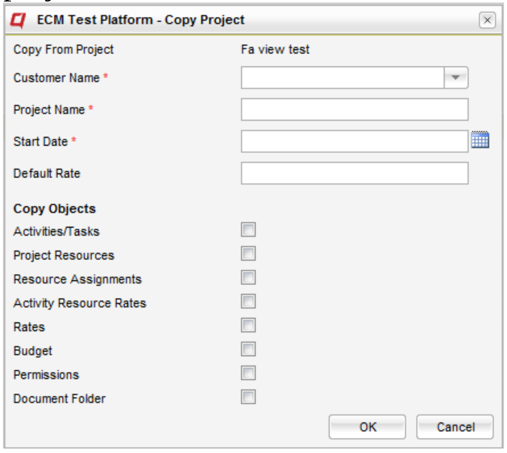



*Change projects within planning*

Before you can access the different tabs, you must first enter general information about the project under the Details tab.

## Copy Project

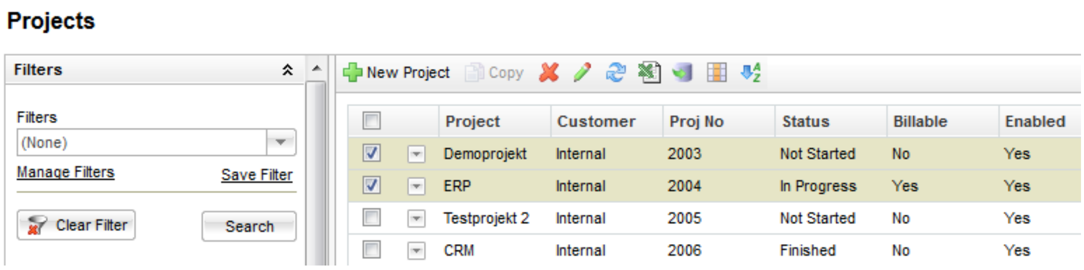
The copy project function allows you to make a copy of the project marked. This way it is possible to set up project templates that can be used when starting new projects. You choose which items to copy from a list.



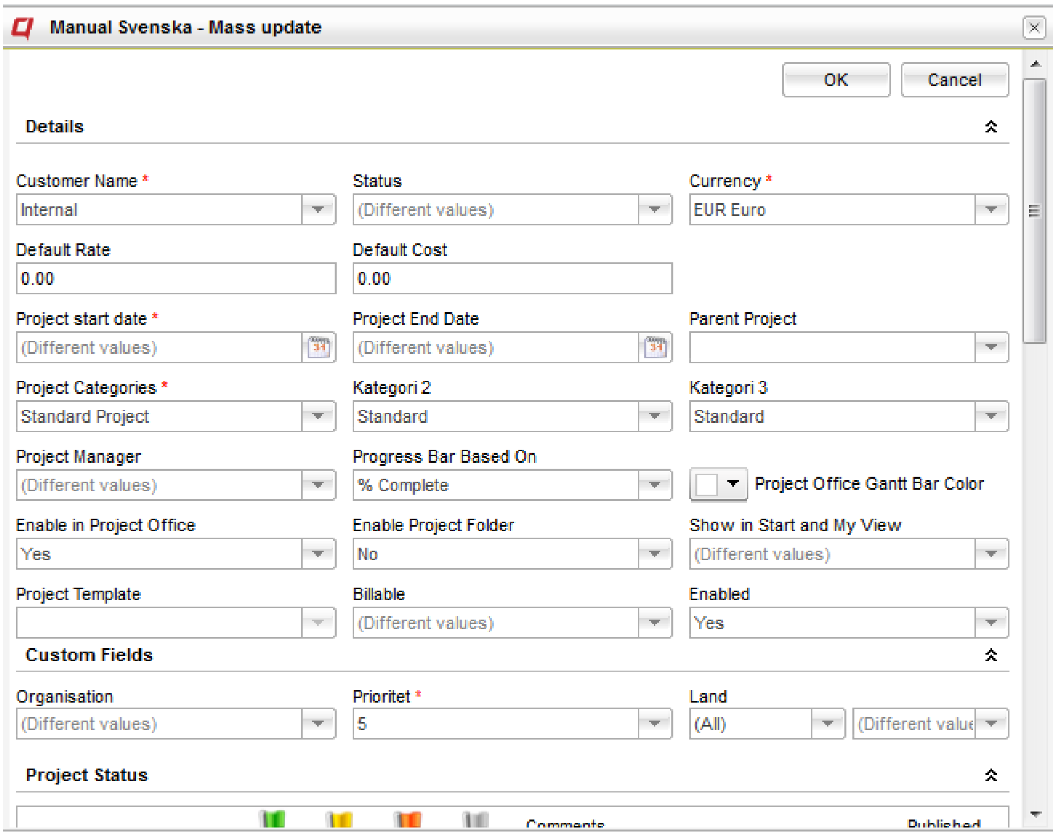

*Copy project*

## Mass update

The mass update functions allows you to update multiple parameters for multiple projects at the same time. Select the projects that should be updated. Click on the pen icon in the toolbar. The mass change dialog opens. Make the changes and save.




*The pen icon in the toolbar opens the mass update dialog*

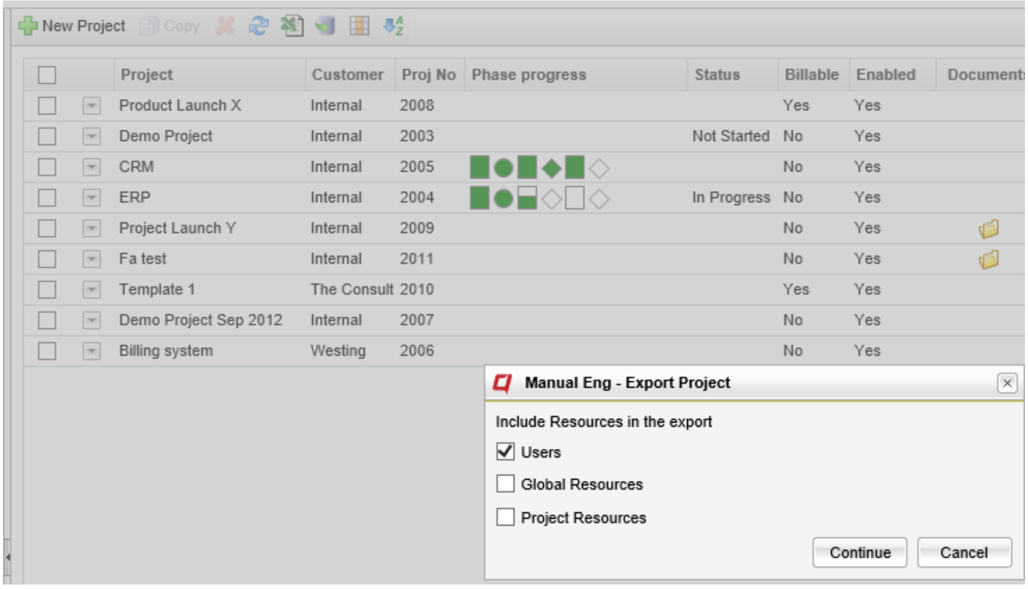


*Mass update dialog*

## Export Project

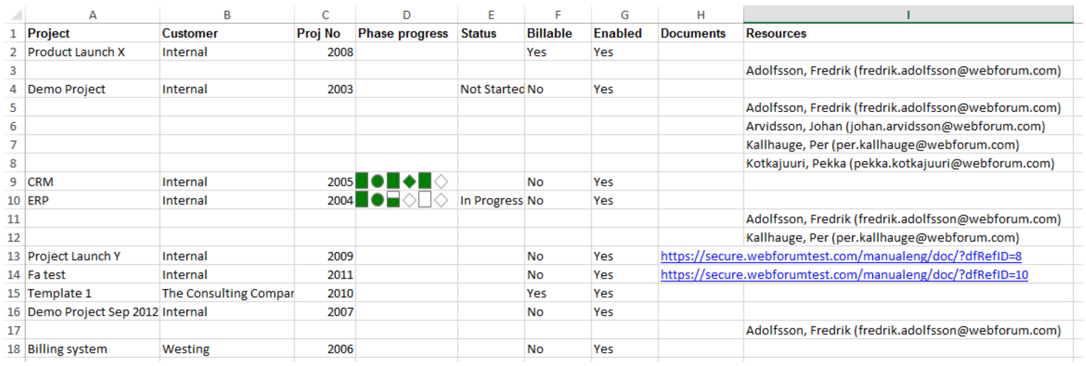
The export project functions allows you to export the projects and columns displayed.

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.

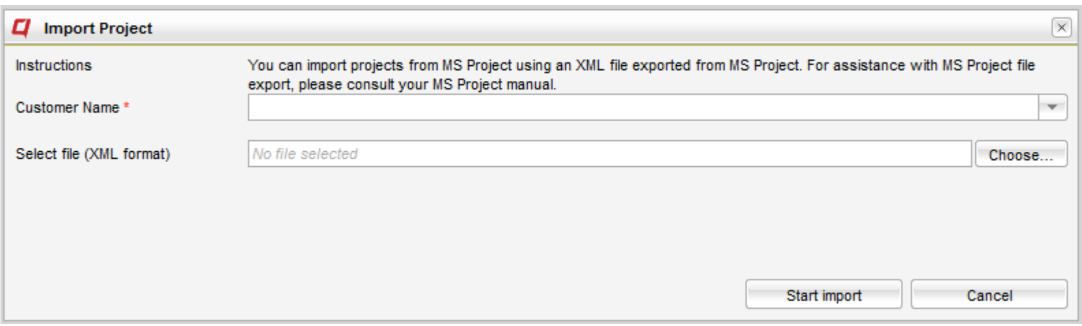


| | A | B | C | D | E | F | G | H | I |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Project | Customer | Proj No | Phase progress | Status | Billable | Enabled | Documents | Resources |
| 2 | Product Launch X | Internal | 2008 | | | Yes | Yes | | |
| 3 | | | | | | | | | Adolfsson, Fredrik (fredrik.adolfsson@webforum.com) |
| 4 | Demo Project | Internal | 2003 | | Not Startec | No | Yes | | |
| 5 | | | | | | | | | Adolfsson, Fredrik (fredrik.adolfsson@webforum.com) |
| 6 | | | | | | | | | Arvidsson, Johan (johan.arvidsson@webforum.com) |
| 7 | | | | | | | | | Kallhauge, Per (per.kallhauge@webforum.com) |
| 8 | | | | | | | | | Kotkajuuri, Pekka (pekka.kotkajuuri@webforum.com) |
| 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*

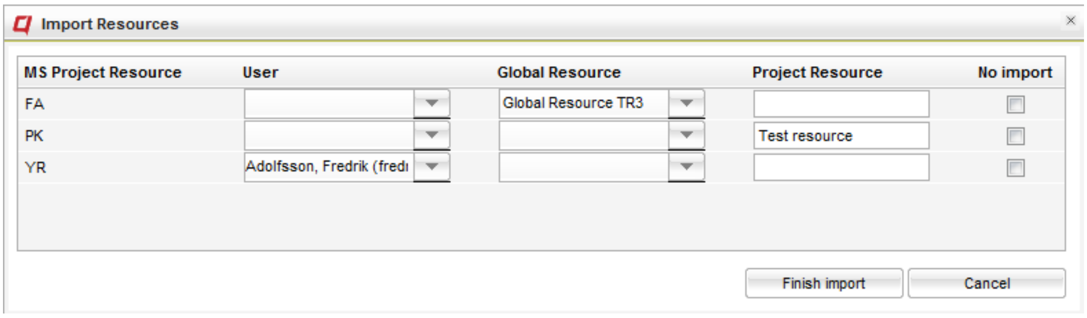
## Import Project

The import project functions allows you to import projects from MS Project, or any other product which support the MS Project export file format (XML).




*Import project*

If the project plan you import has resources in it, it is necessary to connect the MS Project resources with Webforum users or resources. If you want to connect them to users or global resources, the users/resources must be present in the system when you start the import. If you want to connect them to project resources, it is possible to add the project resources during the import.

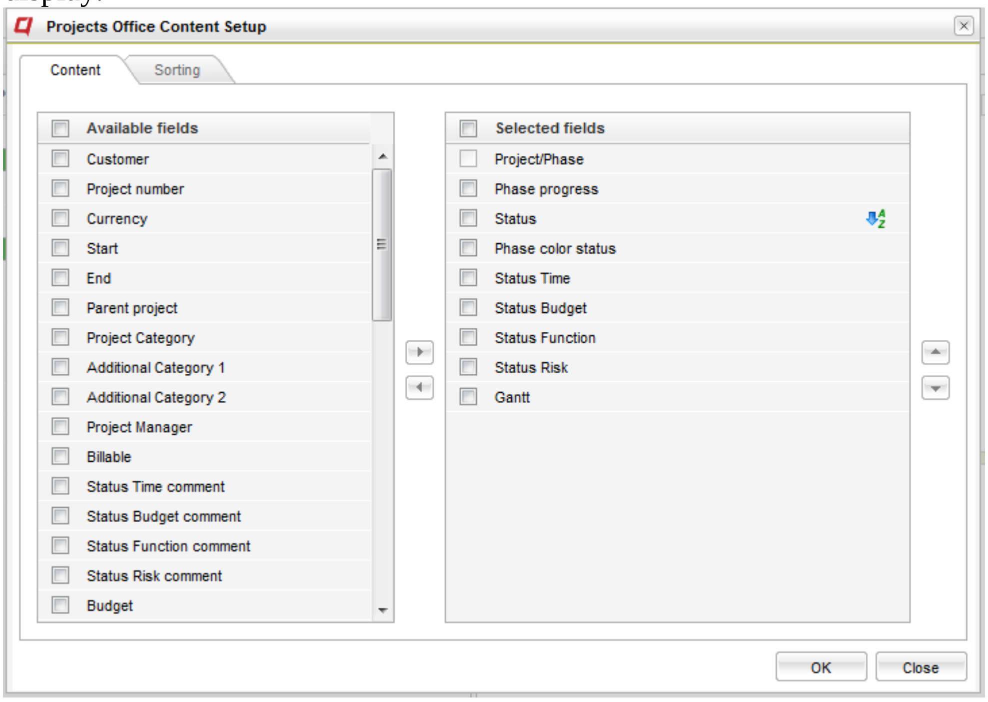



*Import resources*

The import function does not support having your own WBS codes. Only 1, 1.1, 1.2, 2 etc is supported.

## Column Set up

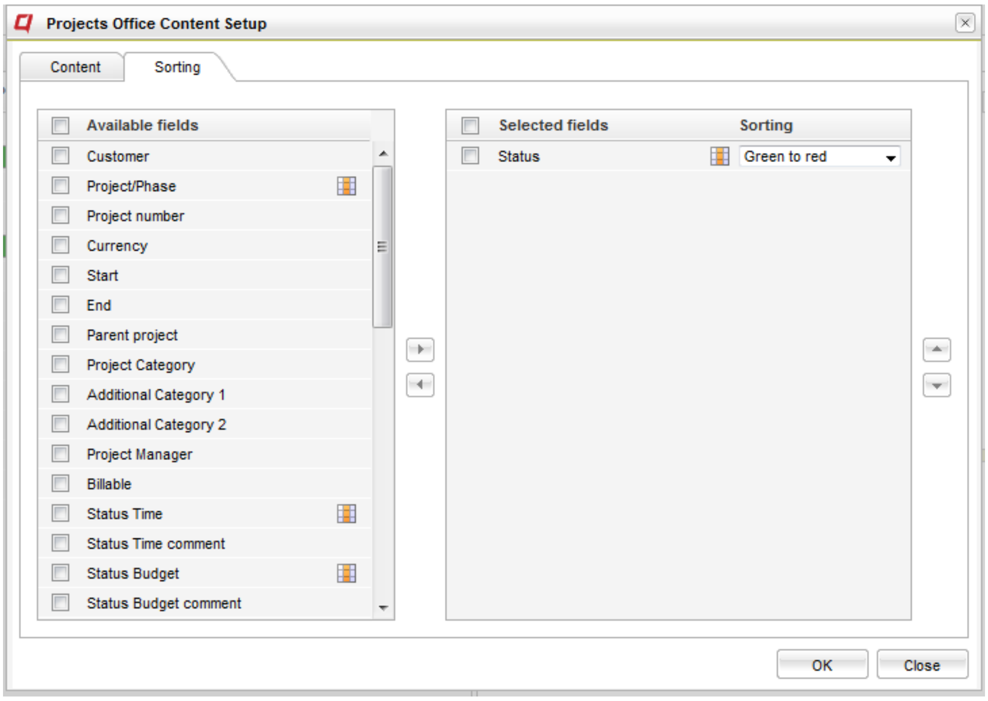
Press the column set up icon on the toolbar in order to choose which columns to display.




*Column set up*

## Sort order set up

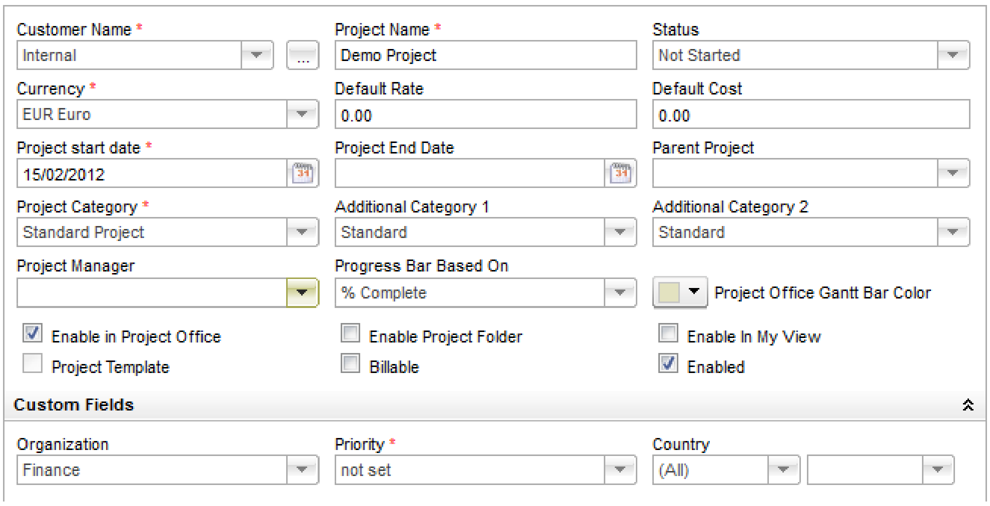
Click the sort order icon in order to choose sort order. It is possible to sort on multiple fields, also fields not displayed in the list.

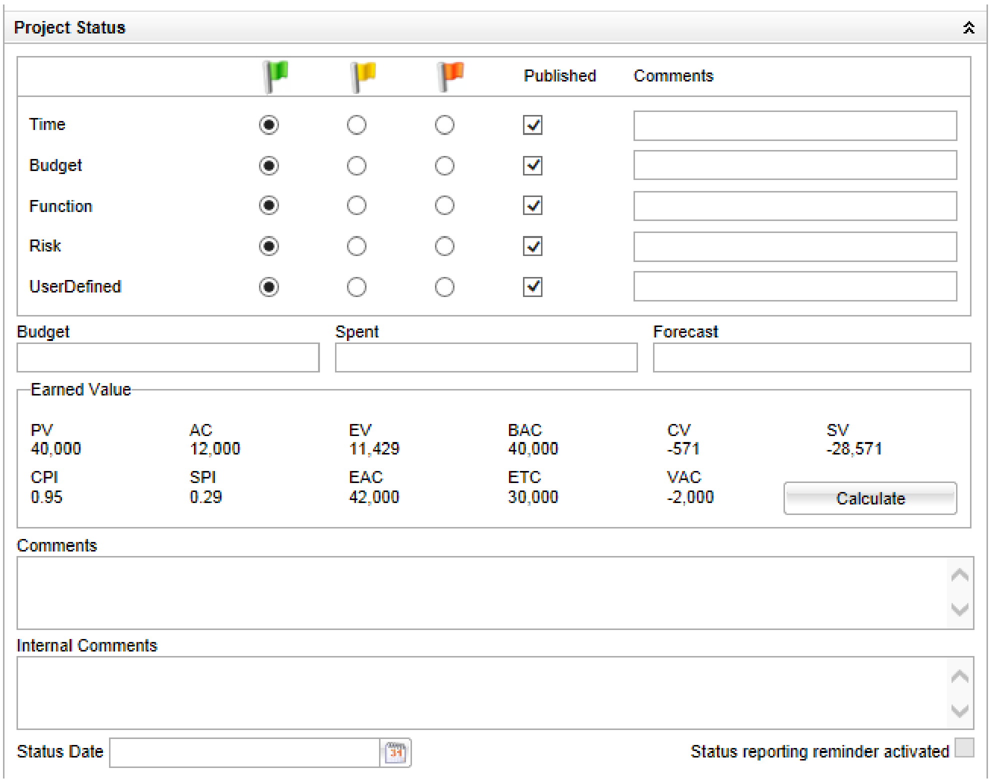



*Sort order set up*

## *Project details*

This is where you enter general information about the project. A project must be connected to a customer. If this is an internal system without external customers, an administrator can set up a dummy or "internal" customer that is used for all such projects.






*The Project details window*

The fields marked with * are mandatory.

**Status** indicates if the project is started, not started or finished.

**Currency** is the currency used in the project. A default currency is set by the administrator for all projects (set up menu).

**Project category** is used as a way to allow follow up on a higher level than project, for instance projects handled by a certain department or function. A default value is set by the administrator (set up menu). There are two user defined category fields. On the configuration menu, the user can choose the name and values for these categories.

A **default rate** set on a project is the standard rate for the unit used for reporting, i.e. normally hours. A standard rate is set for each project. This rate will also be the default rate for resources assigned to the project. The rate can of course be used either as the price a customer will pay or as an internal rate for resources used.

**Default cost** is similar to default rate, but contains the cost, which makes it possible to calculate a gross margin.

“**Project Manager**” is the name of the Project Manager. It must be a system user.

"**Progress Bar Based On**" is a way to select how a progress bar should be displayed, either based on the manual % complete, the calculated % Expend (Spent in units)/(Forecast))

The "**Enable in project office**" checkbox indicates if a project will be shown under the project office tab.

The "**Project Office Gantt Bar Color**" decides which color the project Gantt Bar should have in the project office function if it is displayed.

The "**Enable in My View**" checkbox indicates if the project will show up in the My View overview. The My View is a place where users can see things related to themselves, such as which project activities they are assigned to. This must be checked in order for the Status reporting and the Assignment Notification E-Mail functions to work.

The "**Project Template**" checkbox indicates if a project is a template or not. A project marked as a template will not be displayed in the project office or in Reports. Project templates will be available when creating new projects. It is still possible to create a new project based on any other project, depending on permissions, by using the copy project function.

The "**Enable Project Folder**" function allows you to create a folder directly when the project is created. The folder will get the same name as the project. Members added to the project will automatically get access rights to the project folder and members taken away from the project will have access rights to the folder removed.

The All users group will not have access to the project folder when the folder is created this way. The All users group, any other group or users that are not members of the project can still be given access rights to the folder just as they are given rights today, i.e. in the document archive.

The folder created this way cannot be moved and cannot be deleted as long as it is still attached to the project.

The "**Billable**" checkbox shows if the project can be invoiced or not, it is set to "No" by default.

The "**Enabled**" checkbox indicates if the project is active or not. It is set to yes by default. If a project is disabled, it is not possible to report time on the project and it will not show up in the default project listing.

**Custom fields**

This section is only displayed if there is at least one custom field set up for this workspace. The fields are user defined – see section about custom fields above.

**Status fields**

**Budget**, **Spent** and **Forecast** are numeric fields where you can enter overall figures for the project. These fields are not summed up from figures entered on the project activities.

The fields for **time**, **cost**, **function** and **risk** are primarily set in order to make it possible to get a quick project overview in the project office function. It is also possible to add a status comment for each of these as well as a general status comment.

It is possible to add additional custom-defined status fields that work the same way as the above fields. That is done in system options. It is also possible to take away pre-set status fields if they are not used.

The "**Status reporting reminder activated**" checkbox indicates if this project has status reporting turned on or not. Status reporting is activated in the Project Office, but if the Project Office admin so decides, having this reminder switched on/off can also be handled on a project-by-project basis.

**Earned Value**

It is possible to see Earned Value and similar measurements for a project in the Project Status area. Click on calculate to calculate the different values.

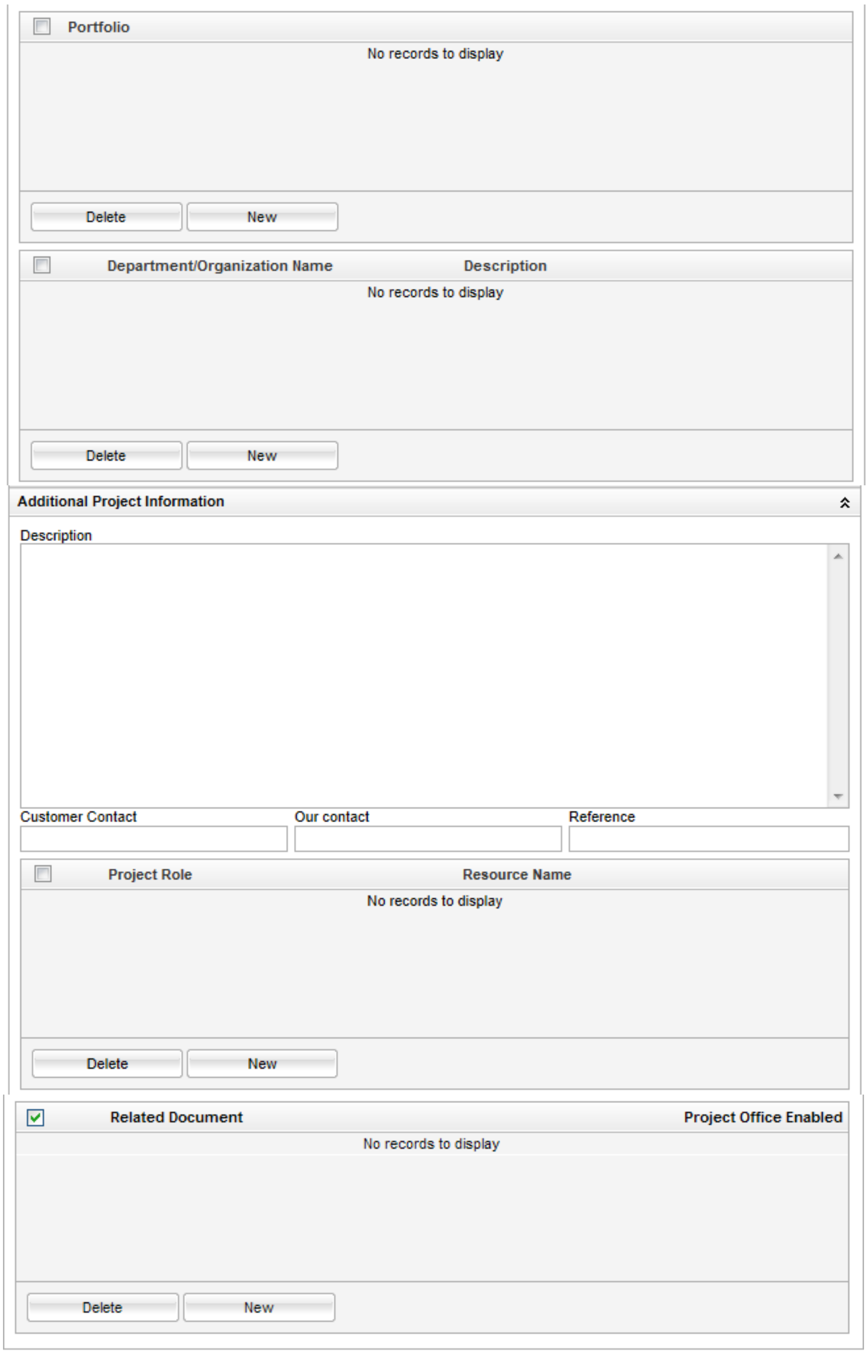
There are different ways to calculated Earned Value. All of them require the use of the amount field, i.e. there must be a unit price for all the units used.

| **Name** | **Description** | **Formula** | **Interpretation** | **PM calculation** |
|---|---|---|---|---|
| PV | Planned Value | | What is the estimated value of the work planned to be done? | Sum of all activity and resource budgets from project start until today. |
| AC | Actual Cost | | What is the actual cost incurred? | Sum of all time reports until today. |
| EV | Earned Value | | What is the estimated value of the work actually accomplished? | EV=sum(AC by today / (AC by today + ETC (from PM)) *BAC) for all activities in the plan |
| BAC | Budget At Completion | | How much did you BUDGET for the TOTAL JOB? | Sum of all activity and resource budgets. |
| CV | Cost Variance | EV-AC | NEGATIVE is over budget, POSITIVE is under budget | |
| SV | Schedule Variance | EV-PV | NEGATIVE is behind schedule, POSITIVE is ahead of schedule | |
| CPI | Cost Performance Index | EV/AC | I am getting _____ cents out of every $1. | |
| SPI | Schedule Performance Index | EV/PV | I am progressing at ___% of the rate originally planned. | |
| EAC | Estimate At Completion | AC + (BAC – EV) / CPI | Actual to date plus remaining budget modified by performance. Formula used when current variances are typical. | |
| ETC | Estimate To Complete<br><br>Should be displayed as integer. | EAC-AC | How much more will the project cost? | |
| VAC | Variance At Completion | BAC-EAC | How much over/under budget will we be at the end of the project? | |
| If AC = 0 -> CPI = 1 | | | | |
| If PV = 0 -> SPI = 1 | | | | |
| If AC and ETC(from PM) = 0 -> EV = 0 | | | | |
| If AC and ETC(from PM) = 0 -> EAC = 0 | | | | |
| If BAC for an activity = 0 -> EAC = AC + ETC (from PM) | | | | |

Calculations are done for each activity individually and then summed up.

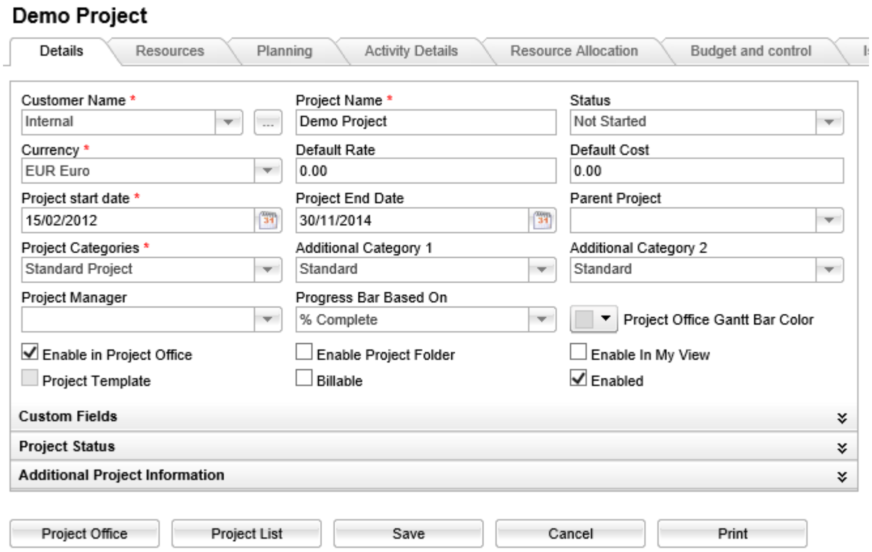
### Additional information fields

Here it is possible to write a project description, information about project roles, project portfolio belonging, information about contacts/agreements as well as information about departments/organizations involved. It is also possible to link documents from the document archive to a project, for instance a more thorough project description. Portfolio belonging is a search criteria in the Project Office overview and the linked documents will be visible as links when opening the Project Detail page from the Project Office.

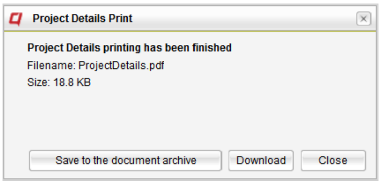



*Additional project information*

## *Project detail print*

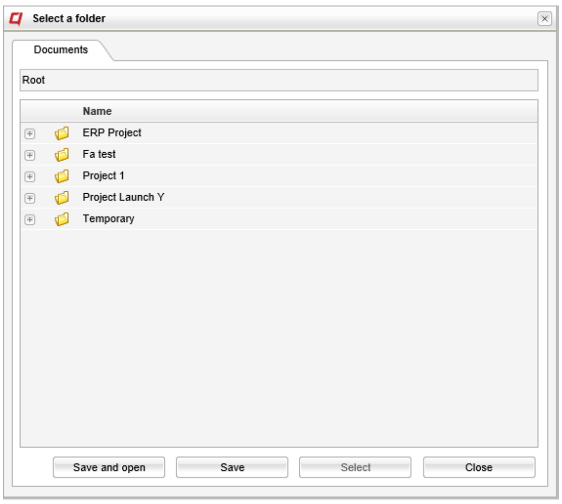



It is possible to print the project detail information. When printing, there is an option to save the print file in the document archive. This function is also available when printing from the project office summary page.




*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*

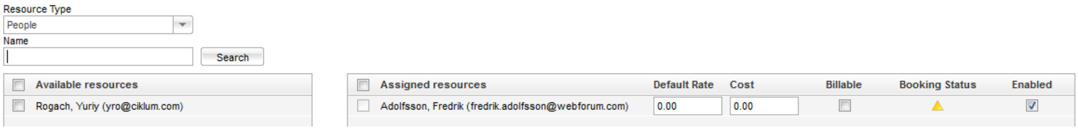
### *Project resources*

This window is used in order to assign resources to a project. This is necessary in order to later add resources to individual project activities. Only resources added here will show up in the resource lists when assigning resources to activities.

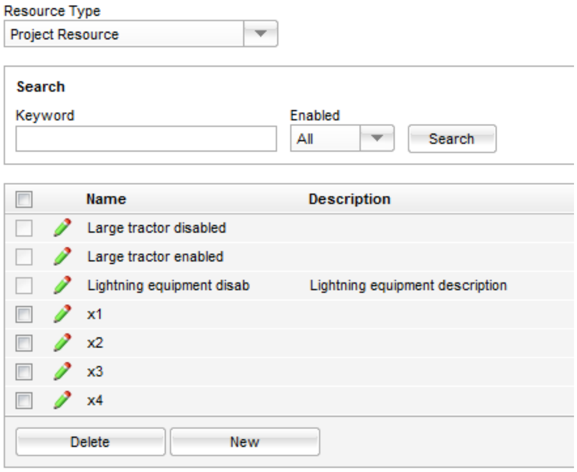
There are three types of resources:

1. People – the same as system users
2. Global Resources – resources added on the resources menu, available for all projects
3. Project Resources – resources added here, available only in this project

Resources can be given a default rate as well as a cost. These can then be used in order to follow up revenues and costs. Booking status is further explained in the section about Resource Utilization. It is also possible to mark if a person is billable or not on this specific project.



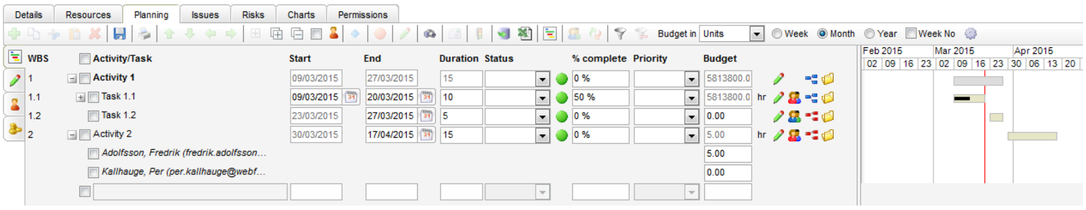

*Resources*




*Add project resources*

Project resources are added by clicking “New” and edited by clicking on the pencil symbol. You can add the same type of information about a project resource as for persons.

### *Project planning and follow up tabs*




*Project planning*

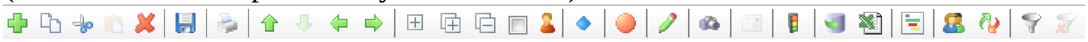
This is where you plan the whole project. Project planning and follow up includes four tabs:

- Planning (including GANTT)
- Activity details
- Resource allocation
- Budget and control

On all these tabs it is possible to add, move and delete activities. It is also possible to change activity names. All these functions are performed either by making changes directly in the activity tree or by using the tools in the toolbar.

For large projects, adding and moving activities in a project hierarchy can be time consuming. Webforum Project Management therefore has advanced functions that make it easier to perform these actions, see the “Paste” description below for more information.

Toolbar functions:
(the exact toolbar options vary between tabs)



| | |
|---|---|
|  | 1. Add button<br>a) Inserts new empty row above the selected row<br>b) Only one row could be selected/active at the same time. If more than one row is selected, the insert button in the toolbar is inactive. |
|  | 2. Copy button<br>a) Copies selected rows.<br>b) Single activities or structures can be copied |
|  | 3. Cut button<br>a) Cuts selected rows<br>b) Single activities or structures or combinations can be cut |
|  | 4. Paste button |

| | |
|---|---|
| | a) Pastes previously copied/cut rows or structures<br>b) Paste as a definition always takes place before current/selected row.<br>c) Rows will be pasted according to the following rules:<br>a. If row above selected row before paste has a higher indentation level than selected row → paste will take place on same level as selected row<br>b. If row above selected row before paste has an equal or lower indentation level than selected row → paste will take place on same level as row above selected row<br>c. If selected row is first activity → paste on highest indentation level.<br>d) Structures will have top item pasted in accordance with rules above, regardless from which level a structure is copied. This applies for both structures that are copied from higher and lower level than the paste level.<br>e) Pasted structures will remain unchanged.<br>f) Recursive paste is allowed. This means that cut/copied rows/structures can be pasted several times.<br>Please note that the Clip board is only active within this form and project. This means that is currently not possible to copy/paste activity data between projects or paste activity data in another form. |
|  | 5. Delete button<br>a) Deletes selected rows.<br>b) Select one or several rows, using row check box.<br>c) If a structure level is selected, all underlying sub-structures and activities are deleted. A warning message is displayed.<br>d) If selected activity is referenced from another table, delete is not allowed.<br>e) If several activities are selected and one or more activities are referenced from other tables, no deletion will take place. An error message is displayed. |
|  | 6. Save button –saves the current view |
|  | 7. Print button – prints the current view |
|  | 8. Move up button |
|  | 9. Move down button |
|  | 10. Indent left button |
|  | |

| | |
|---|---|
| | 11. Indent right button |
|  | 12. Expand branch button<br>a) Expands all nodes in current branch<br>b) The Button is only enabled when a structure level activity is selected. Only one structure level activity could be selected at the same time. |
|  | 13. Expand all button<br>Expands all nodes |
| | 14. Collapse all button<br>Collapses all nodes |
|  | 15. Drill down to resource button – choose if the expand button should expand down to the resource level or not |
|  | 16. Milestone – Makes the task into a milestone. This means that it is not possible to assign a resource and the end date will always be the same as the start date. |
|  | 17. Decision point.- Makes the task into a decision point. This means that it is not possible to assign a resource and the end date will always be the same as the start date. |
|  | 18. Mass update button<br>Change values for all selected rows at the same time |
|  | 19. Project Folder – Opens the folder in the document archive that is connected to the project in a new window |
|  | 20. Baseline – Create a baseline based on the current view |
|  | 21. Assignment Notification E-mail |
|  | 22. Status Reporting |
|  | 23. Activity Import – Import activities from MS Project (XML) or Excel (CSV) |
|  | |

| | |
|---|---|
| | 24. Export button<br>Export the currently displayed rows to excel |
| | 25. Refresh GANTT button (Planning tab only)<br>Refreshes the GANTT scheme with changes to the activity tree |
| | 26. Multi resource assignment<br>a) Function used to assign one or several resources to several activities in one step<br>b) A number of activities could be selected by ticking the row check box.<br>c) Resource assignment screen is displayed.<br>d) Resources that are assigned to all selected activities are displayed on the right hand side.<br>e) Resources that are not assigned to all selected activities are displayed on the left hand side. |
| | 27. Replace resources<br>Replace an assigned resource with someone else |
| | 28. Filter – decide which fields to filter information on |
| | 29. Clear filter – clears current filters |
| | 30. Gantt set up options – show baseline in Gantt |
| | 31. Add button<br>a) Inserts new empty row above the selected row<br>b) Only one row could be selected/active at the same time. If more than one row is selected, the insert button in the toolbar is inactive. |

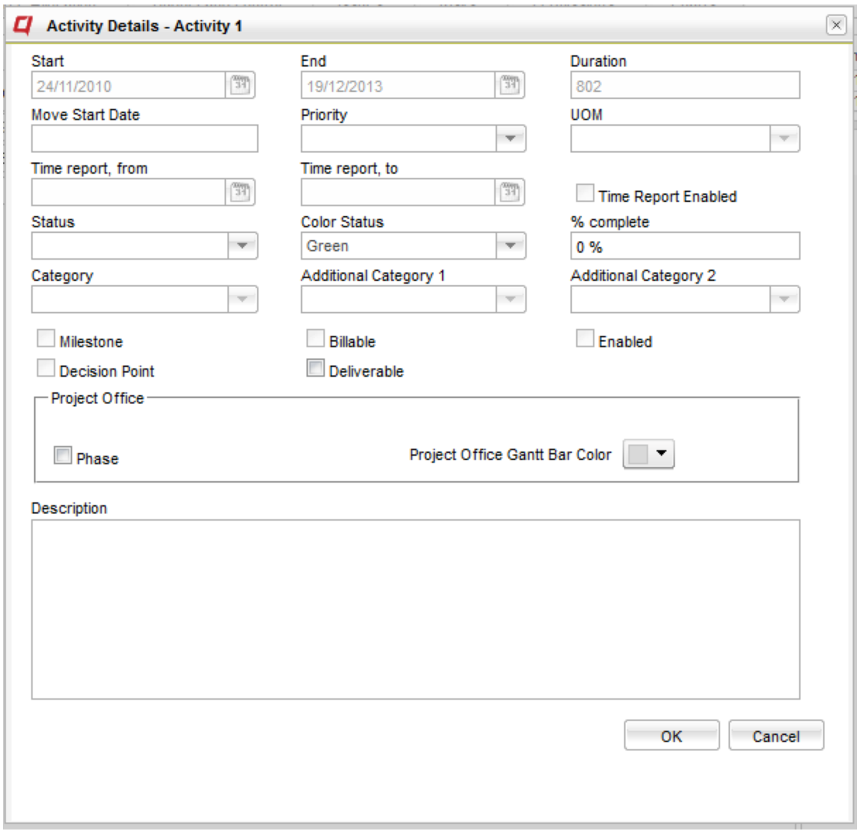
By double clicking on an activity, that field becomes active and it is possible to change the activity name.

### *Planning*

The Planning tab gives you an overall view of the project in the time dimension, i.e. the start and end dates for different activities and the corresponding GANTT chart. The GANTT chart can be displayed in weekly, monthly and yearly views. There is also a checkbox to decide if dates or week numbers should be displayed, provided that your workspace is using week numbering.

Here you can also set activity status and priority as well as add comments to tasks and assign resources.

By clicking on the pencil symbol, you open a pop-up window where you can add detailed information about a specific activity.




*Activity details dialog*

The checkbox "**Time Report Enabled**" indicates if the activity will show up on the time report tab.

The checkboxes "**Milestone**" and "**Deliverable**" indicate if an activity is a milestone or a deliverable. Milestones are marked with a  symbol in the GANTT chart. Deliverables are marked with a  symbol in the GANTT chart.

The checkbox "**Phase**" indicates if the activity will be shown under the project office tab. The "**Project Office Gantt Bar Color**" is a way to choose which colour the activity will have when displayed in the Project Office.

The phase status overview symbols, , are displayed in the planning view for activities markes as phases. If an activity has started, the phase symbol is 50% filled. If an activity is finished, it is 100% filled. Not started activities are empty. Milestones and decision points are either filled (finished) or empty (not started/started).

The "**Deliverable**" checkbox indicates if an activity is classified as a deliverable. This will also be shown in a separate column if the project activities are exported.

If you have custom fields defined for activities, they will also show up.

The other rows are described in more detail under the Activity Details tab, see below.

### Activity import

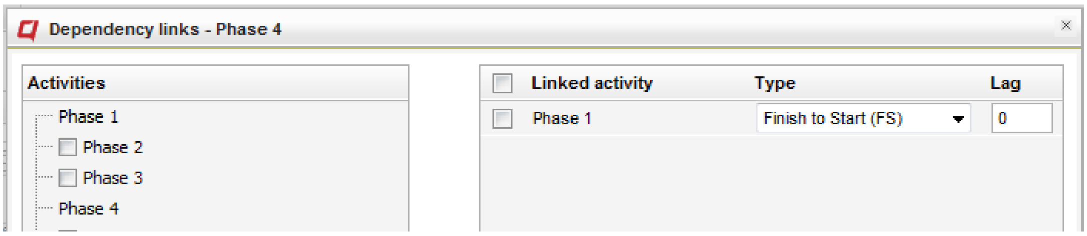
By clicking the activity import icon , it is possible to import activities. The procedure is similar to the Import Project function. It is possible to import activities from both MS Project and from Excel (CSV-format). When Excel values are imported, it is necessary to have activity name, start date and end date in the file.

### Resource assignment

A green resource assignment icon next to a row indicates that no resources are currently assigned to the activity. A red icon indicates that there are resources assigned. By clicking either the icon on a row or in the toolbar, it is possible to assign resources to either one activity or many activities at the same time. In the resource assignment window it is also possible to set who is responsible for an activity. Only responsible persons will get requests for status reports.

### Dependencies

By clicking the dependencies icon, it is possible to make an activity dependent on other activities.



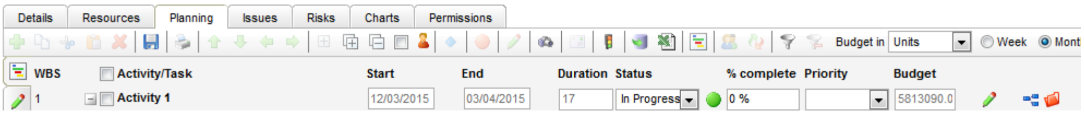
*Dependencies*

There are four types of dependencies, FS (Finish to Start), FF (Finish to Finish), SF (Start to Finish) and SS (Start to Start).

FS – The dependent activity will start when the linked activity is finished
FF – The dependent activity will finish when the linked activity is finished
SF – The dependent activity will finish when the linked activity starts
SS – The dependent activity will start when the linked activity starts

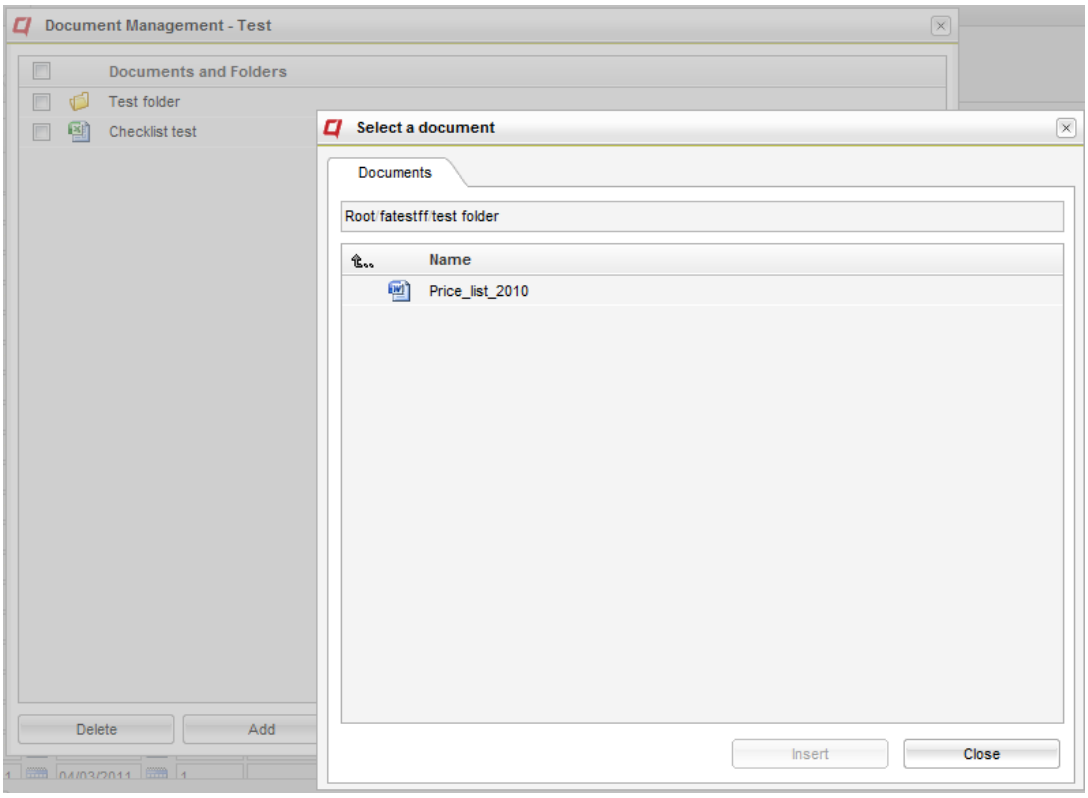
The lag describes if the activity should start/finish directly in connection to the start/finish of the linked activity, or if there should be a gap. The lag unit is days.

## Activity – Folder/Document link




*Planning view with linked Folders/Documents*

It is possible to link Folders and Documents to activities. This is done using the folder icon on the activity row. By pressing the folder icon, a dialog with folders and documents linked to the activity is displayed.

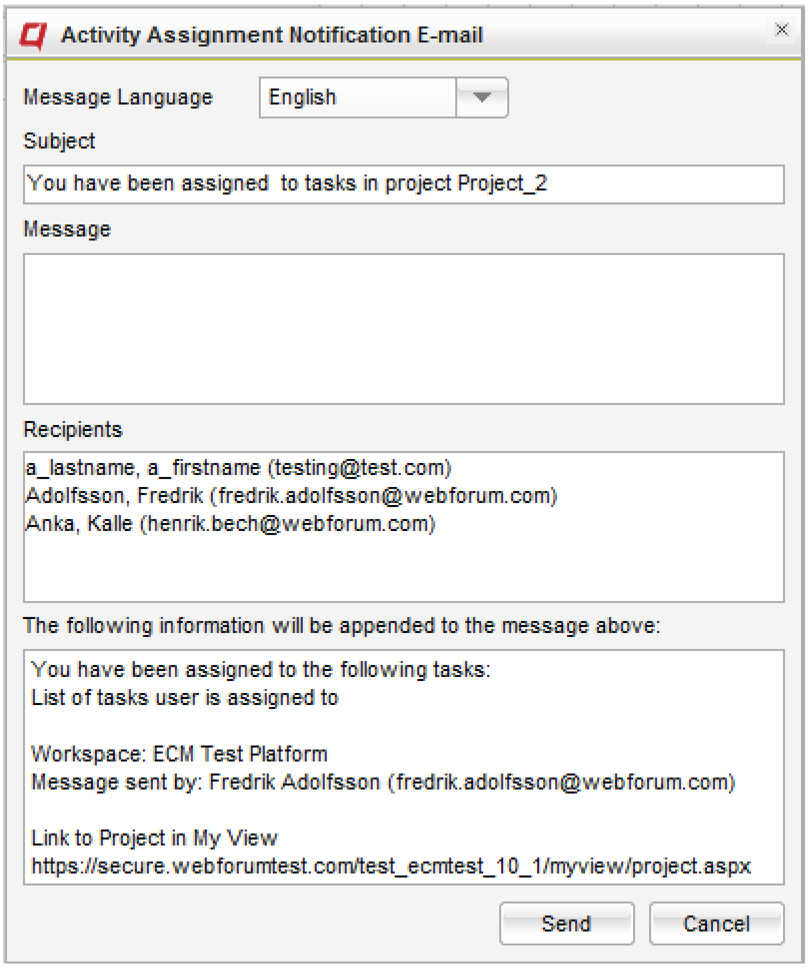



*Select folders/documents to link*

By pressing “Add” it is possible to link additional folders and documents to the activity. If there are folders or documents linked to an activity, the folder icon will be red. Clicking on a folder or document will open the folder/document in the document archive, just as when clicking on a folder or document link (URL) in another program, such as a link in a mail.

## Assignment Notification E-mail

By clicking the assignment notification icon, , it is possible to send an e-mail to all users assigned to the activities that have been checked. The project must have the “Enabled in My View” icon checked for this icon to be enabled.



*Activity Assignment Notification E-mail dialog*

As can be seen in the picture above, the mail will contain a link to the Project in "My View". There the user will be able to see which activities he/she has been assigned to and some general information about the activities. Projects/Activities with status "Finished" are not shown.

*My View Project Activities*

## Status Reporting

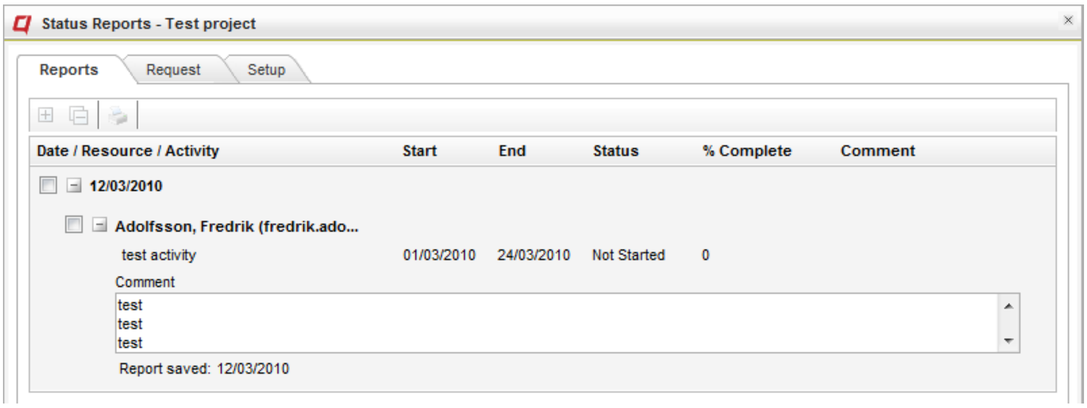
By clicking the status reporting icon, , it is possible to request and look at status reports related to the project. If a status report is requested, the person responsible for the activity will receive an e-mail where he/she is asked to fill in a status report in "My View". The e-mail will contain a link to the correct status report. The project must have the "Enable in My View" checkbox checked in order for the status reporting function to be enabled.

If you want to request a status report immediately after adding responsible resources to activities it is important to first save the project so that the newly added persons will receive a request.

The status reports dialog contains three tabs:

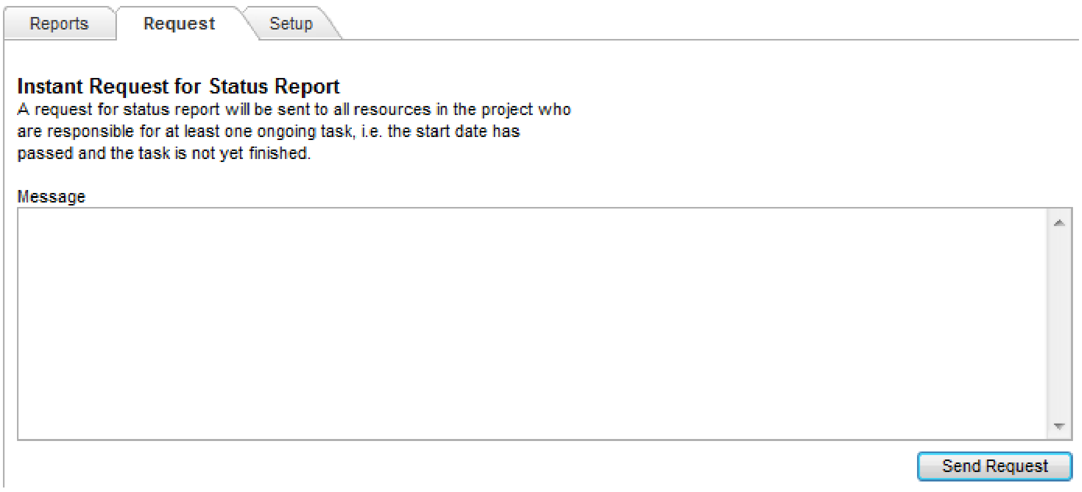
1. Reports
2. Request
3. Setup

The Reports tab contains an overview of all reports sent.



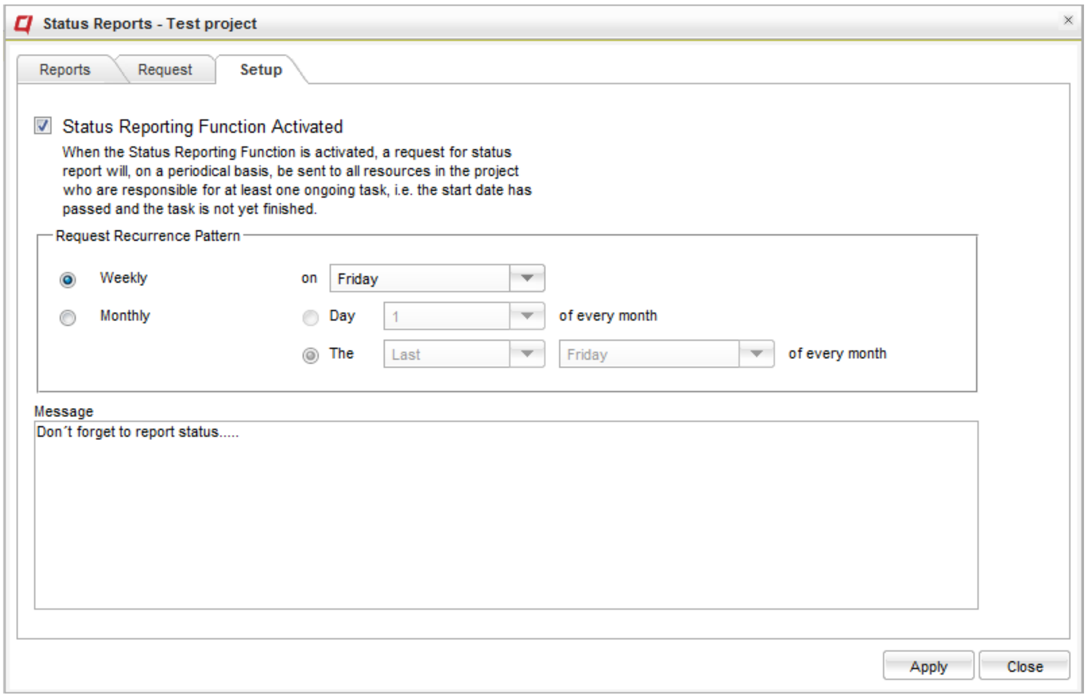

*The status report "Reports" tab.*

The request tab is a way to send an instant request for status reporting.



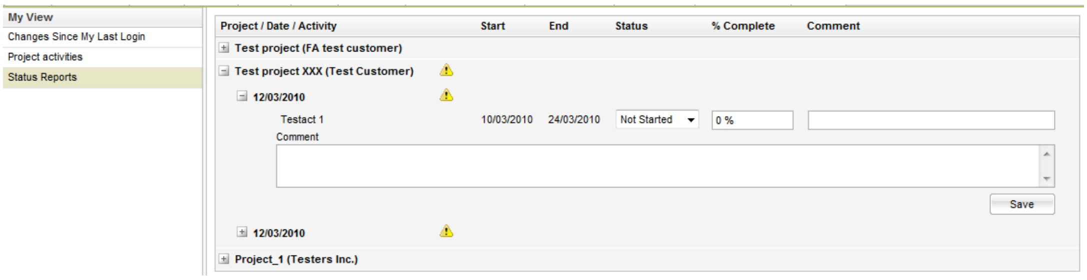

*The status report "Request" tab.*

The Setup tab is where periodical requests are set up.




*Status report setup*

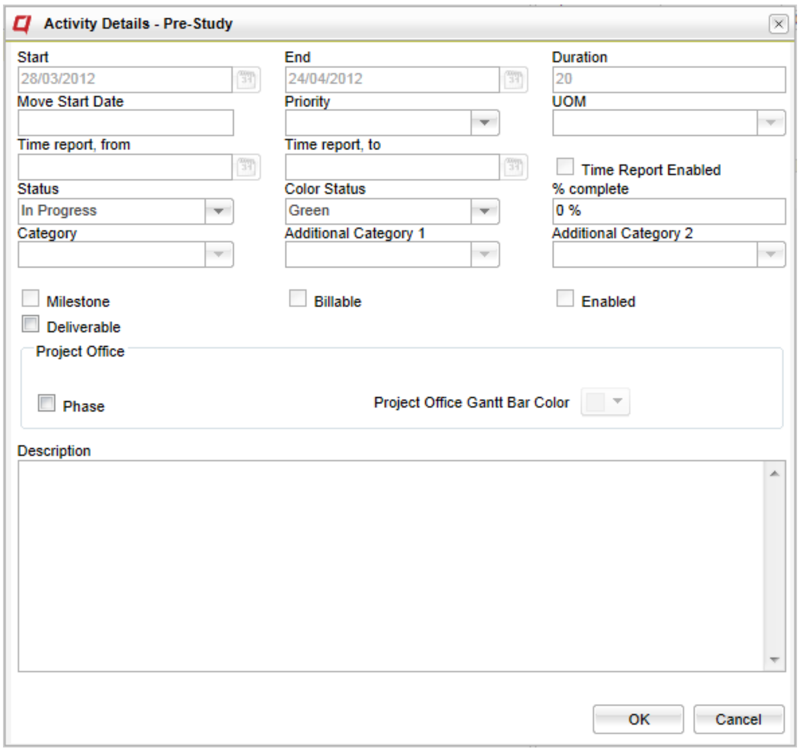
This is what the My View Status Report section looks like:




*Status Report Section in My View*

### Mass Update/Activity Details Dialog

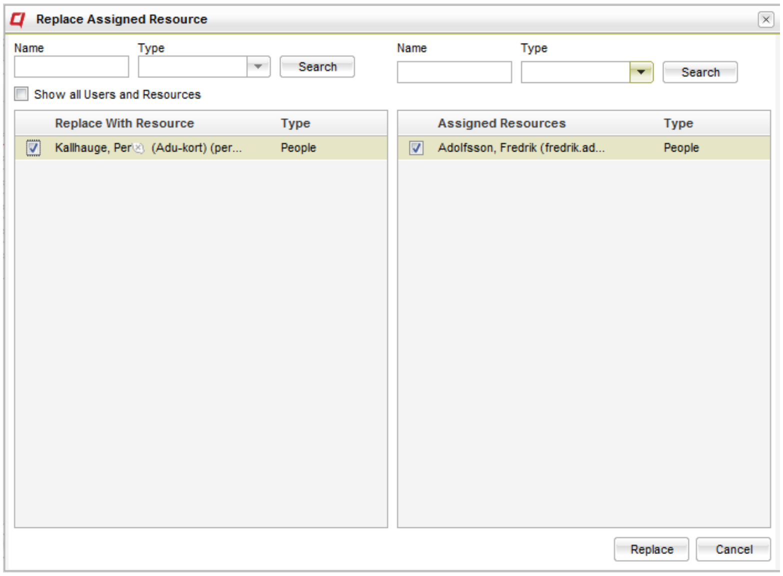
The mass update dialog works just like the activity details dialog, but it changes all selected rows at the same time. If different types of activities (normal activities, milestones, top level activities) have been selected, some of the fields may be greyed out. Please note the “Move Start Date” feature, which has also been added to the standard activity details window. Write for instance “3” or “-3” in order to change the start dates for the selected activities forward or backwards 3 working days. The values “System” and “Additional Activity Category Y” are examples of customer-set names for the two customer-defined activity categories. If you have custom fields defined for activities, they will also show up.




*Activity Mass Update*

## Replace resources

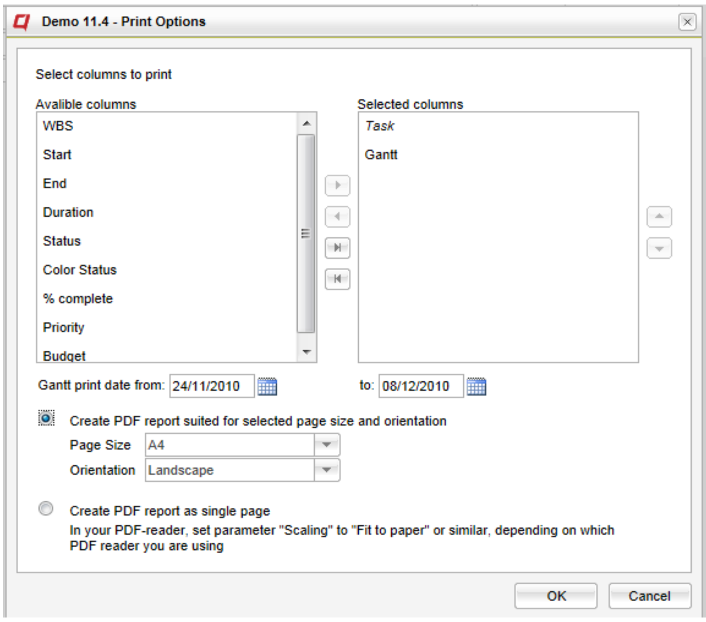
With the replace resources function it is possible to change who is assigned to an activity. Perhaps Person 1 was assigned to Activity 1 and 2, but then he/she must work with other projects. With this function, Person 1 is replaced by Person 2 for all the selected activities. Please not that it is not possible to replace resources once they have started to report time.




*Replace assigned resource*

## Print

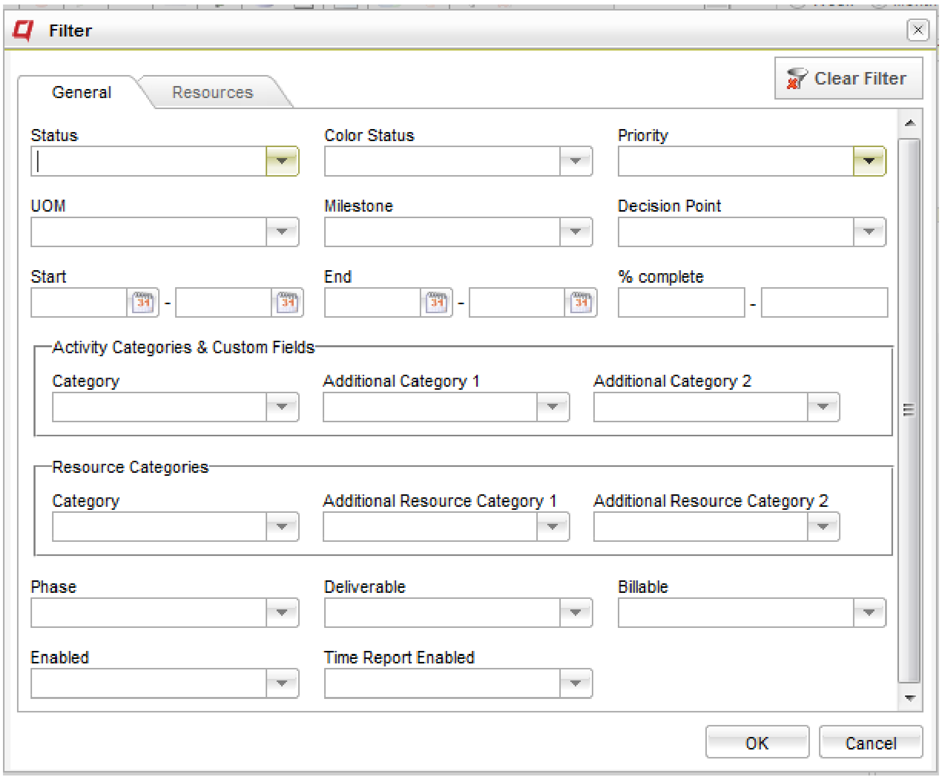
It is possible to choose which information to print and which type of page a report should be suited for. It is for instance possible to scale the report so that it always fits on one page.



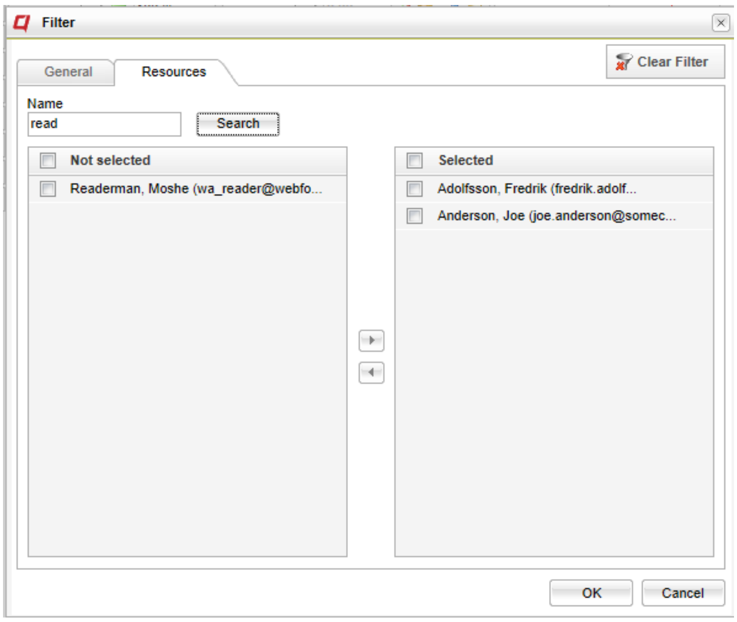

*Print parameters*

## Filter

The filter function allows you to filter which activities and resources that should be displayed. All activities that meet the filter criteria plus all their parent activities will be displayed. All sums displayed will also be filtered the same way. If you have custom fields defined for activities, they will also show up.



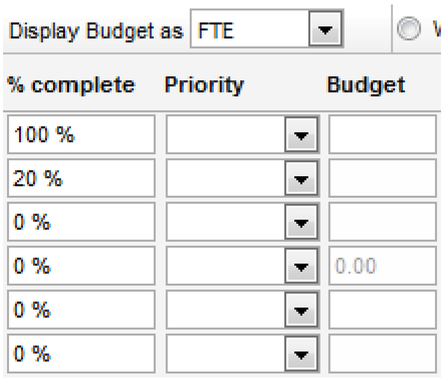

*Filter General*




*Filter Resources*

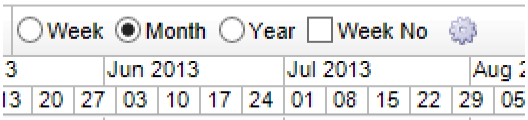
## Display budget as

The “Display budget as” function makes it possible to see and change budget values in units, FTE (Full Time Employees) and Percentage. This is useful when you, for instance want to assign a resource full time to an activity for the duration of that activity rather than calculating the exact number of hours a resource should work.



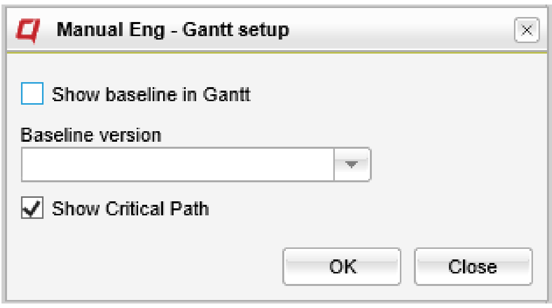

## Baseline in Gantt

It is possible to display a Baseline in the Gantt chart. Click the set up icon above the Gantt chart to do this.

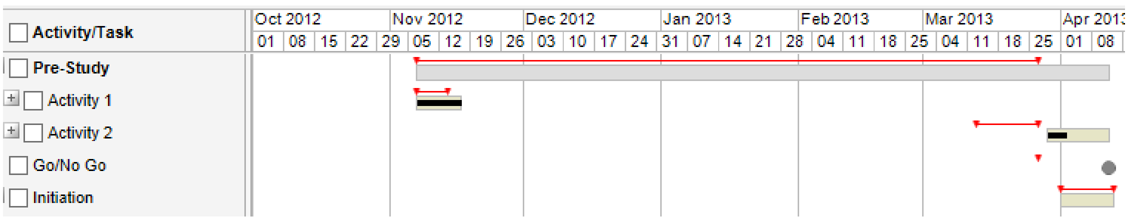



*Gantt setup*

In the Gantt setup it is possible to choose if a baseline should be displayed.




*Gantt setup pop up window*

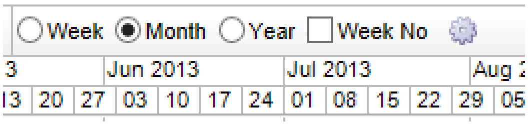



*Baseline displayed in Gantt*

## Critical Path in Gantt

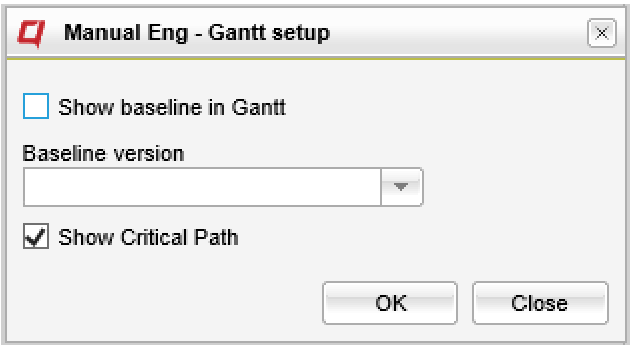
The critical path is defined as those activities that affect the end date of a project. The critical path will consist of those activities with the same end date as the end date of the last activity plus activities which those activities are dependent on.

It is possible to display the Critical Path in the Gantt chart. Click the set up icon above the Gantt chart to do this.



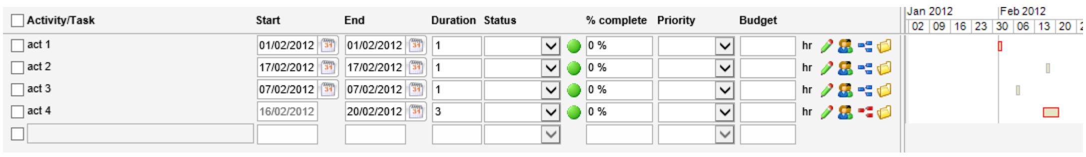

*Gantt setup*

Click “Show Critical Path”




*Gantt setup pop up window*

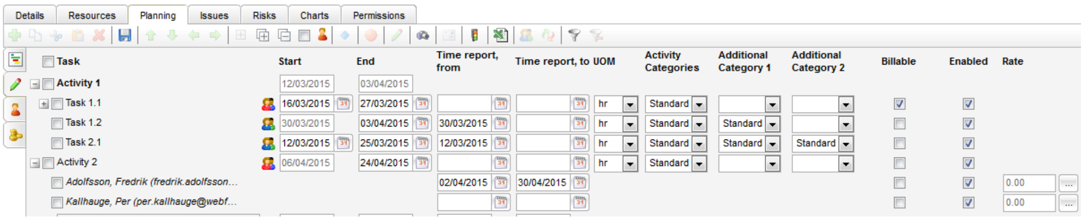
The critical path will be shown as activities with red around them.




*Critical path*

### *Activity details tab*

The Activities tab is where you handle activity details, such as which dates resources can report time on the activity. This is also where you choose which unit of measure that you want to use and which category a certain activity belongs to.
The “Time report from” and “Time report to” fields are useful when an activity has been planned, but you do not want resource to be able to report time on that activity except for a defined period.




*The Activity details tab*

Even though it is possible to use various units of measure for different activities, you should be aware of the fact that this may make it more complicated to follow up the project on a high level, since different units of measure will not add up correctly.

**Activity Categories** can be used in order to follow up certain standard activities that are similar in many projects, for instance, amount of time spent on programming, house building, project administration or whatever category that is used in your type of business. You can of course choose not to use this function, in which case the system administrator should make sure that there is at least one category that is named “standard” or similar.

**Billable** – this indicates whether or not that activity is billable or not. This is mainly used for consultancy companies.

**Enabled** – this indicates whether or not the activity is enabled. If the activity is enabled, it will show up on the time reporting sheet.

By clicking on the resource icon, it is possible to see or change which resources that have been assigned to a specific activity.

**Rate** - It is possible to change the rate used for a certain resource when performing a certain job. In some cases this may be useful when one resource has different rates for different activities in a project. Please note that when changing rates, there must be at least one rate with no End Date.

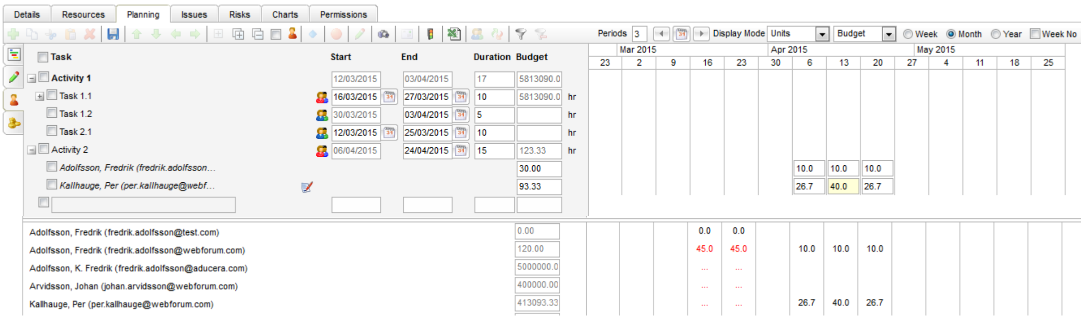
### *Resource allocation*

The resource allocation tab is used both for planning and follow up of activities and for managing resource bookings for a single project. This section is primarily dealing with the activity level. Bookings are mainly explained in the Resource Utilization section of the manual.

**Resource allocation – activity planning**
The resource allocation tab can be used in order to plan when different resources should perform different activities.

The top part shows all the time each resource will spend on the different activities. The bottom part shows the summarized time a resource will spend on all activities.

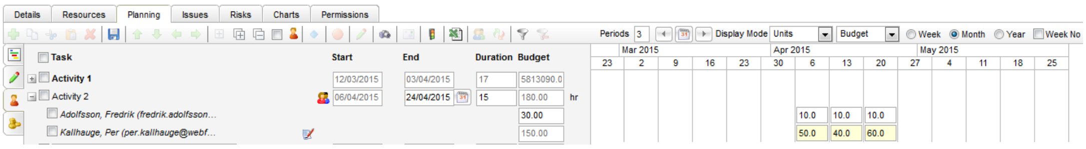
If a resource is allocated 50% if the available time to the project and the standard workweek is 40 hours, all time in excess of 20 hours per week will be marked red. No time is allocated to customer-defined off-days, such as Christmas Day. Time allocation is made in proportion to the duration of the activity. If a 12-hour activity is planned to 2 days, of which one is an 8-hour day and one is a 4-hour day, the time will be allocated with 8 and 4 hours respectively. 24 hours would be allocated with 16 and 8 hours to these days.




*The Resource Allocation Tab*

The resource allocation tab has one additional filter icon, . It is used in order to filter which resources to show.

It is possible to choose how many periods to display at the same time. It is also possible to display either budget, actual or ETC values. There is also a choice of units to display.

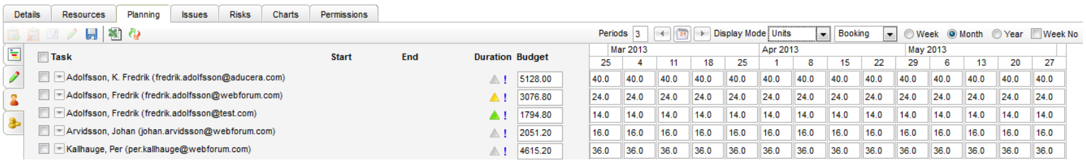



*Manually entered budget values*

Budgets can be manually updated on a resource level if you want a different allocation than the standard one. The budget distribution will automatically influence ETC values as well. The icon symbols that the budget has been manually updated. Clicking on it will take away the manual allocation and distribute the budget evenly over the activity duration, taking the calendar into account.

### Resource allocation – booking

The resource booking in resource allocation displays the same information as in the Resource Utilization view, but for one single project, i.e. only one row per person is displayed. See Resource Utilization for more information about the booking functions.



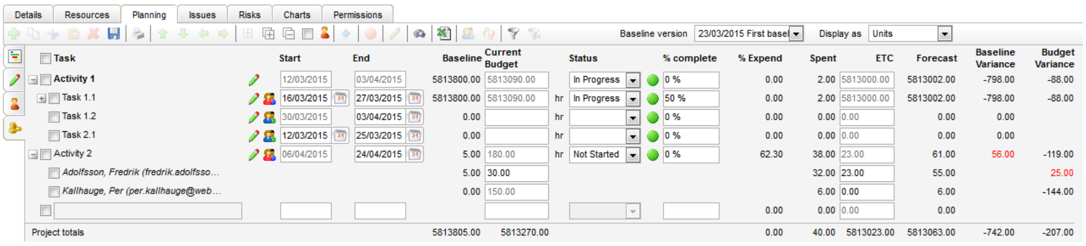
*Resource Booking in Resource Allocation*

Just as in Resource Utilization, it is possible to switch between displaying booking and other scenarios (Booking, Budget, Spent, ETC, Forecast).


*Display modes*

### Budget and control

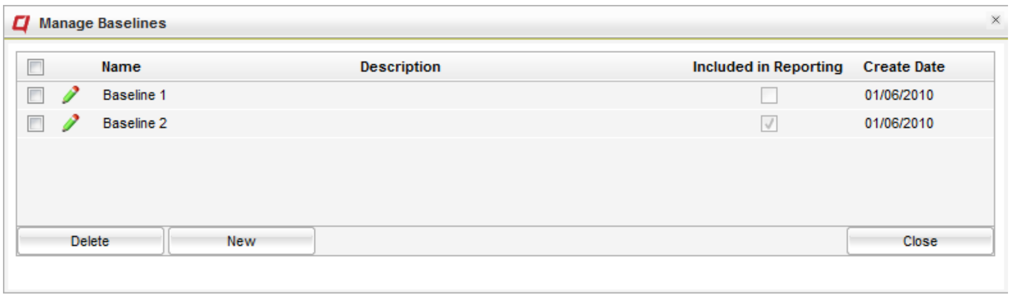
The Budget and control tab is used when setting budgets for the various activities. It is possible to display the information in units, amounts or costs. It is also possible to show one specific unit of measure or all at the same time. If all units are displayed, they will be summed up regardless of unit of measure.



*The Budget and Control Tab*

This page also includes summary information about the project.

It is also possible to set and work with baselines. A baseline is a snapshot of the project budget at the time the baseline is set. Press to set or manage baselines. You can choose in the list which baseline you would like to compare the current budget and forecast with. You can set as many baselines as you whish, but only one baseline at a time can be shown in the Report & Analysis function. Check the "Included in Reporting" flag for the baseline that should be shown in Reports & Analysis.




*Baseline Managemt*

The Budget and Control tab also contains a number of measures:

**% Complete:** The manual % complete set by the project manager or administrator
**% Spent:** time reported / (time reported + Estimate To Complete, ETC)*100

**Forecast** is the sum of time reported and the estimate to complete, ETC. The numbers are summarized, which means that the top activity in the hierarchy will contain the sum of budgets, time spent and ETC.

**Baseline Variance:** Forecast-Baseline
**Budget Variance:** Forecast-Budget

When you enter a budget figure, it will be copied to the ETC column unless there is time reported on that activity.

*You must choose the same unit of measure for all activities if you want these sums to be relevant for your project*

### *Issues*

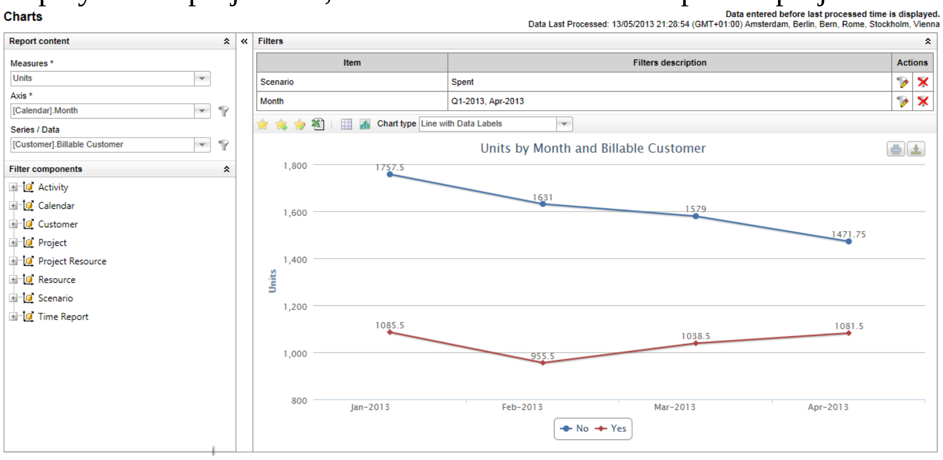
This tab is further explained under “Issues”

### *Risks*

This tab is further explained under “Risks”

### *Charts*

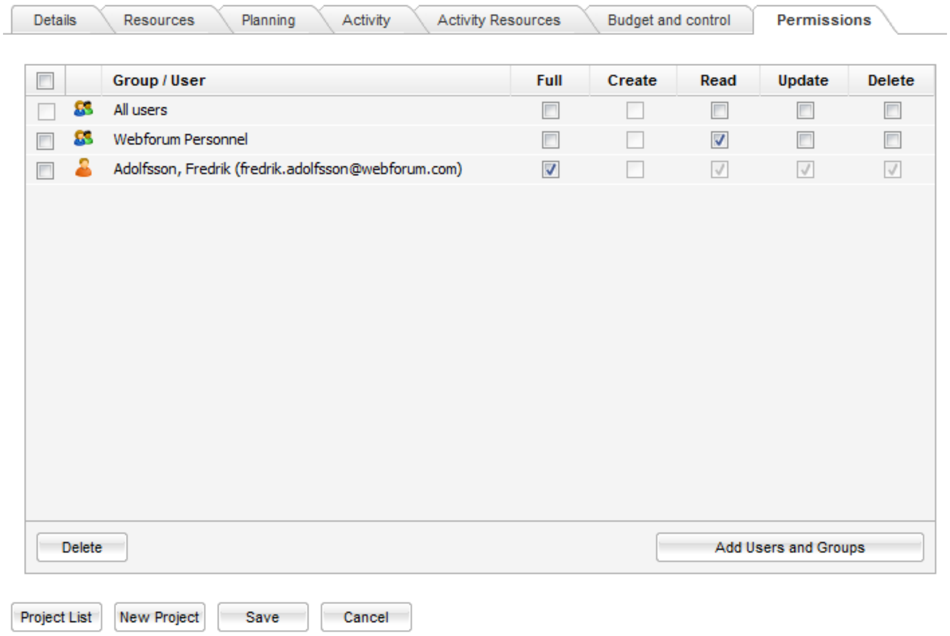
Charts are explained in more detail in the Report & Analysis appendix. When displayed as a project tab, charts are filtered on that specific project.




*Charts*

## *Permissions*

The Permissions tab is used for setting object permissions on specific projects. Just as in the rest of the Webforum service, it is done by selecting users and groups and then giving them specific permissions. If a user or group has permission “Read” or higher, the project will show up in the “Reports and Analysis” menu, but permission “Update” is required in order to access the Project tabs. It is important to remember that the permission for a certain user is equal to the highest permission that a group he or she belongs to has.



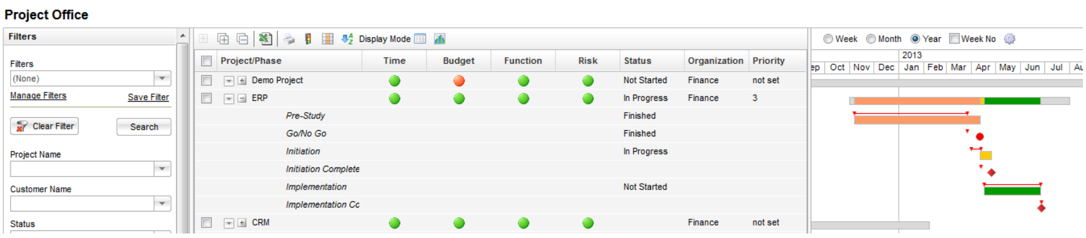

*The Permissions tab*

”Full” - full access to all tabs, including the Permissions tab.
”Create” - not used (in order to create new projets – see group rights in admin)
”Read” - gives access to all project tabs except Permissions. No changes can be made.
”Update” - access to all tabs except Permissions, possibility to change data.
”Delete” - possible to delete the project from the project list page.

# Project Office

The project office tab shows an overview of all projects. It normally shows information related to the current workspace. Please contact Webforum if you are interested in connecting workspaces so that the Project Office can display information from multiple workspaces.

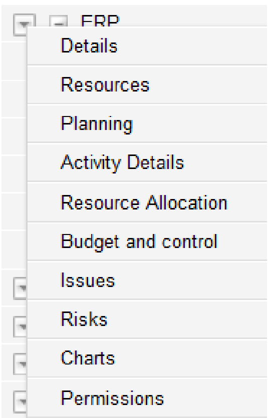
General project detail information, such as the project status as well as the GANTT-scheme is displayed. If there is a subproject, it is also shown, as well as project phases. A project phase is a project activity with the “phase” checkbox marked. In the project planning you can also choose to give different phases different colours. By dragging the mouse over a status symbol, you will see the status comment, if there is one. Use the expand/collapse buttons to choose the level of detail you want to see.




*Project Office*

Clicking on a project name will open it in details mode.

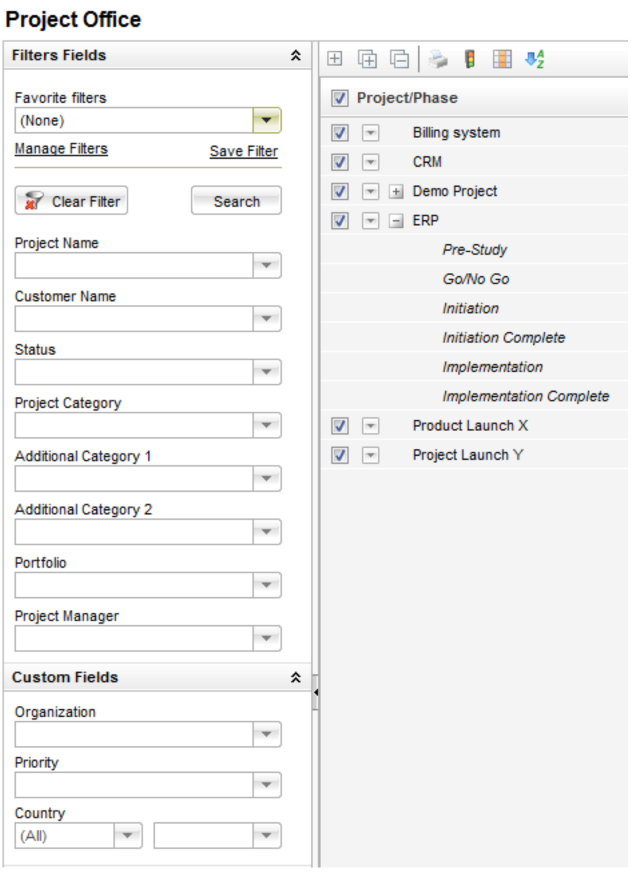

Clicking on the context menu will give a choice to open one of the project tabs.




*Context menu for a project*

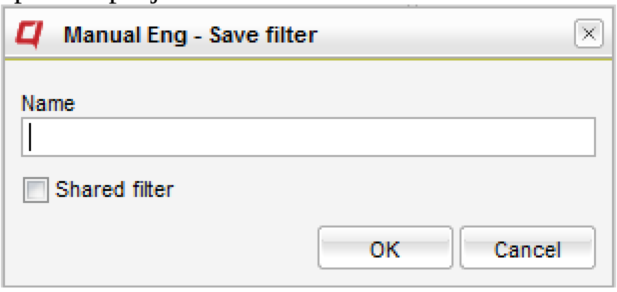
### *Project Filtering*

In the left pane, it is possible to filter projects to display.



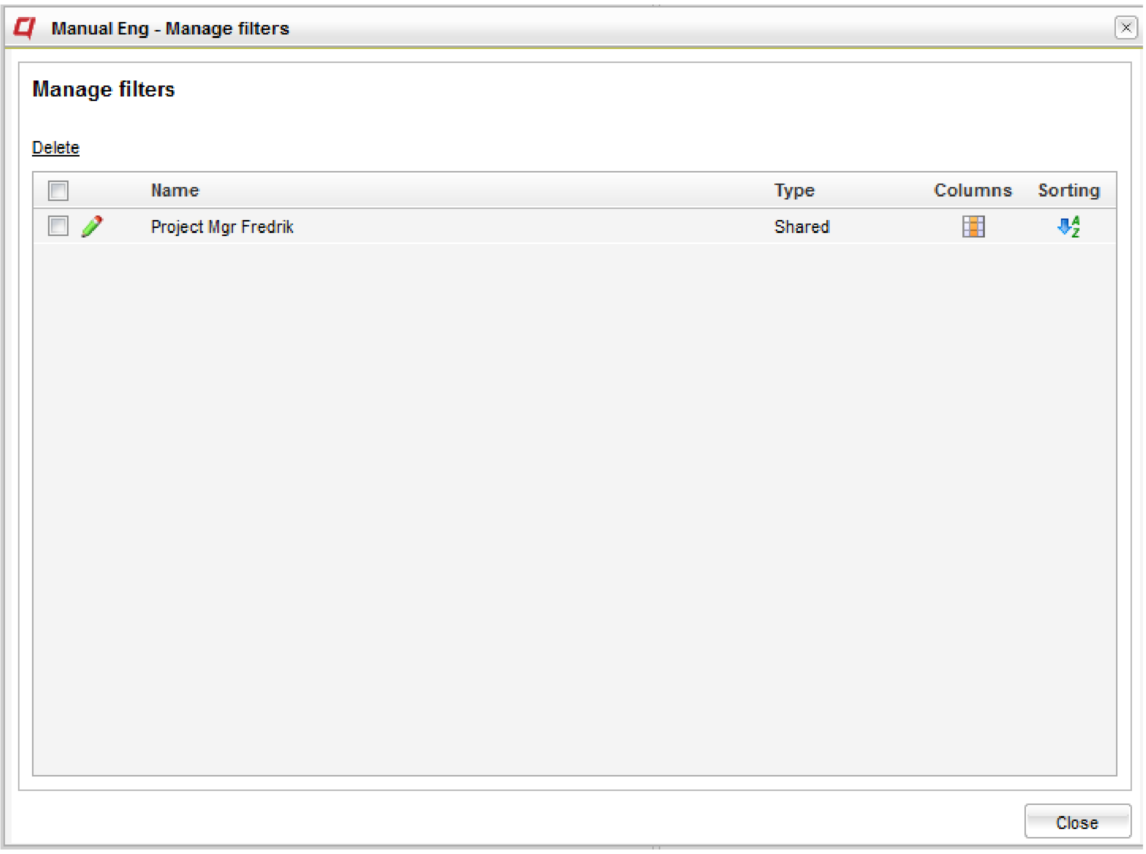

*Project Office filtering*

It is possible to save different filters.
When saving a filter, it is possible to choose the "Shared filter" option so that others can use the filter. Project level permission settings will still be applied for each specific project shown in the overview.




*Save filter*

Filters are managed by clicking "Manage filters" in the filter pane. For each filter it is possible to change the columns and sorting order.




*Manage filters*

## ***Toolbar***

The toolbar contains buttons to expand/collapse the tree structure as well as functions for printing and status reporting. It is also possible to choose column set up and sort order.

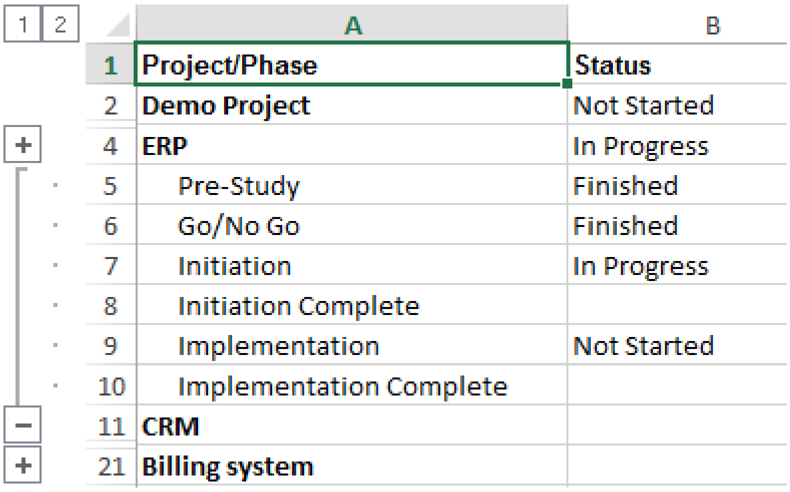
**Export**

It is possible to export the displayed fields from the project office by clicking the excel icon .

All fields, except the Phase progress and GANTT scheme will be exported.

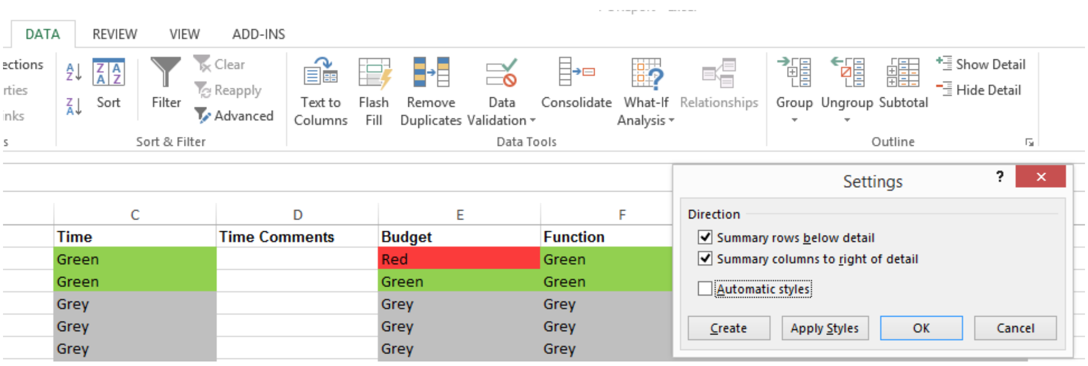
Excel will display hierarchy levels, but the order of appearance will be based on the excel setting, which means that the plus sign for expansion may be displayed below the sub projects or phases.




*Hierarchies in excel.*

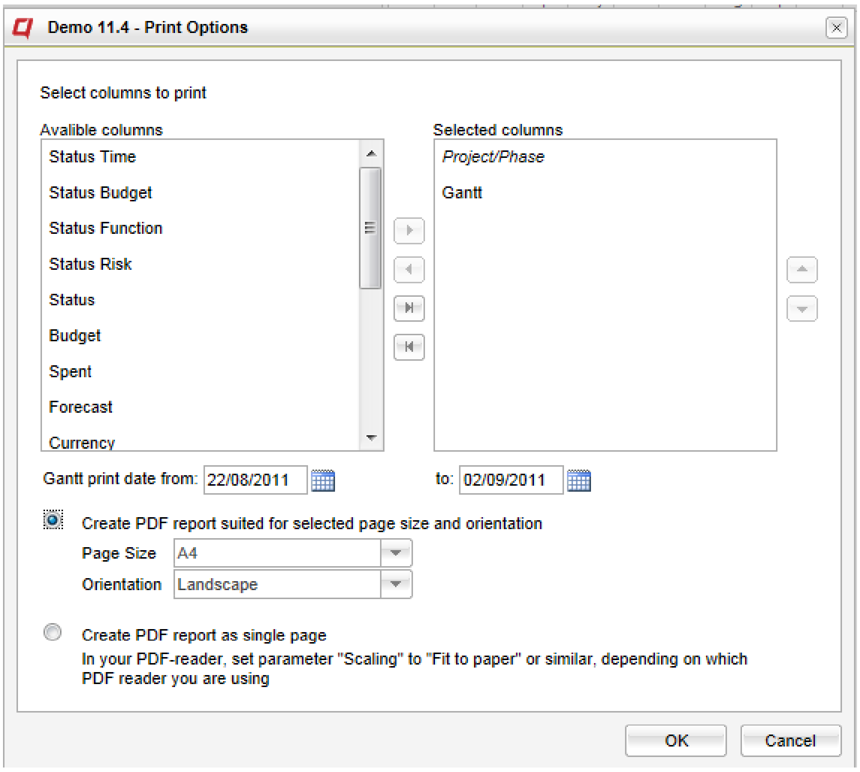
If you want to have the top level plus sign above the subproject/phase rows, uncheck “Summary rows below detail” in the outline menu that is reach from the data tab. The exact location of this choice depends on the version of excel that you are running.




*Sort order for summary rows in excel*

## Print

The print button allows you to choose which columns and which part of the GANTT chart to print out. You can also choose paper size.

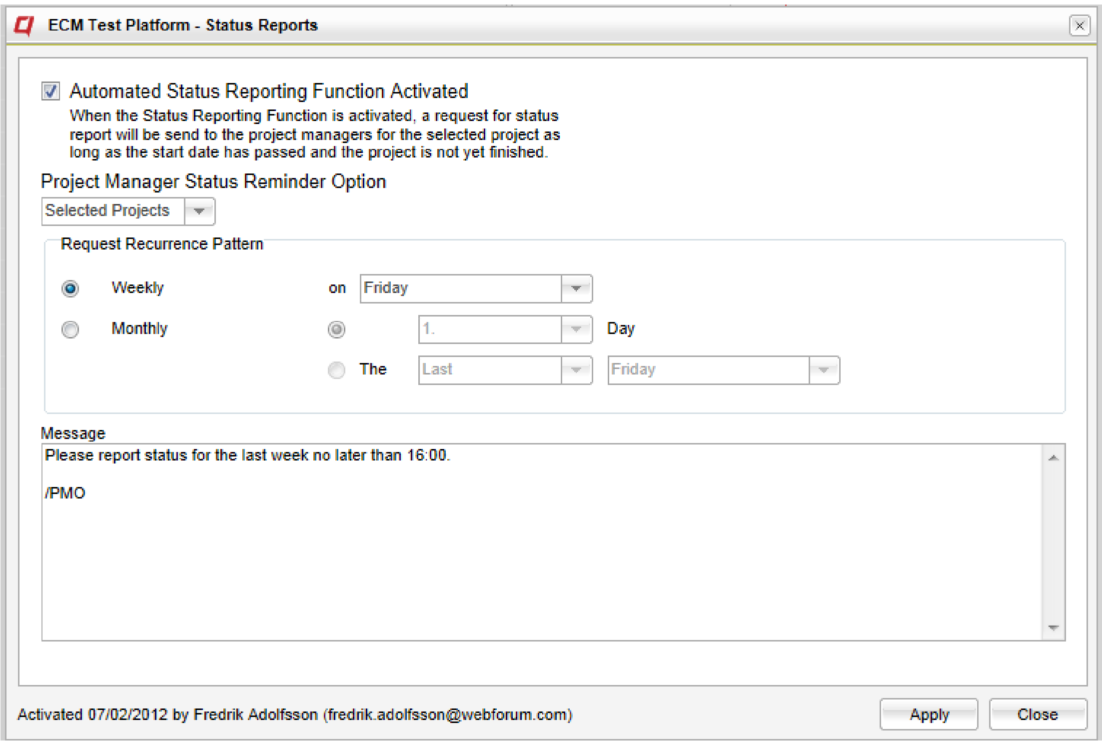



*Project Office Print*

### Status report reminder

Clicking on the traffic light symbol  will open the Status Report set up window. Here it is possible to activate the status reporting function and to select if a reminder should be sent to all Project Managers or only to managers for selected projects. If all are chosen, status reporting reminder cannot be updated on a project level. If “Selected Projects” is chosen, the status reporting reminder function can be switched on and off for individual projects. If “Selected Projects” is chosen, a project with this function switched on will have a symbol before the GANTT chart in the project office listing.

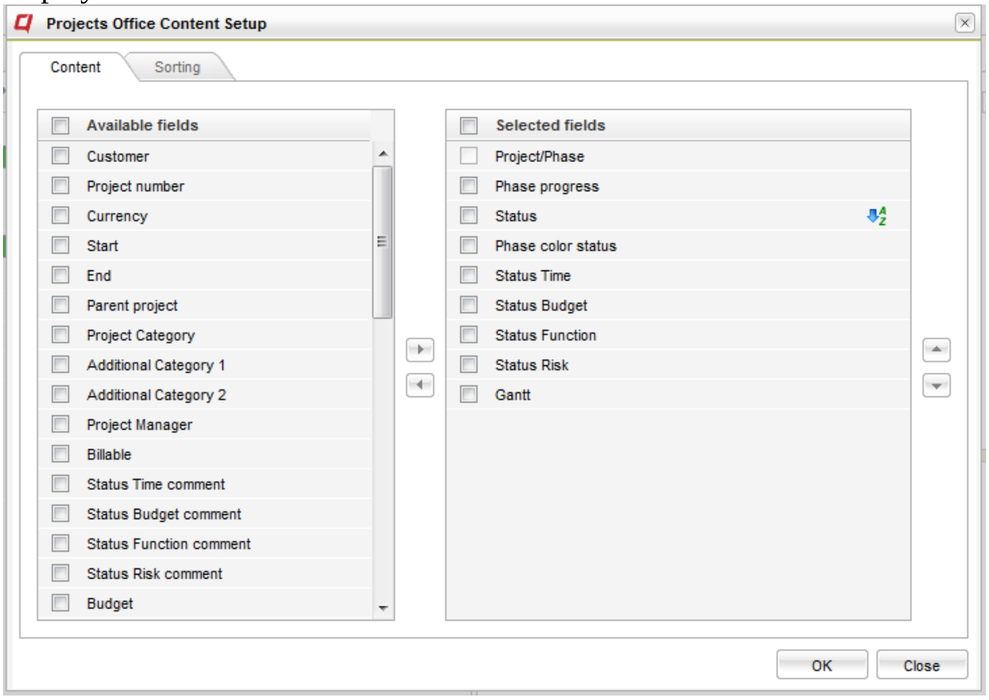
Project Managers will get an e-mail reminder to update status together with a link to the projects he/she is managing so that the status fields can be updated.




*Status reporting reminder set up*

## Column Set up

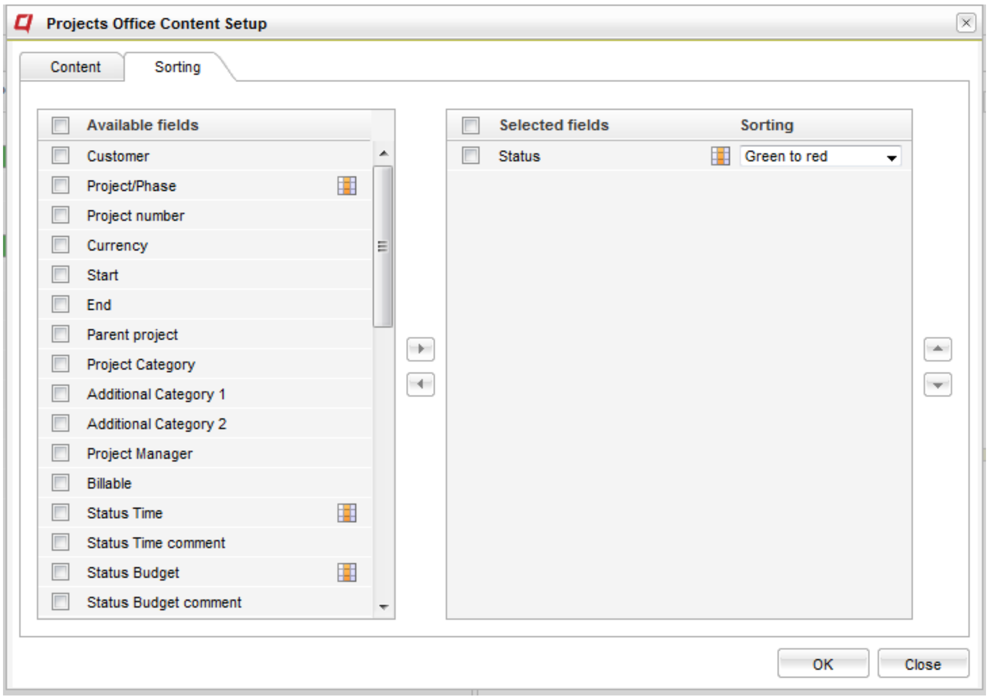
Press the column set up icon on the toolbar in order to choose which columns to display.




*Column set up*

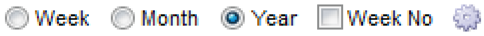
## Sort order set up

Click the sort order icon in order to choose sort order. It is possible to sort on multiple fields, also fields not displayed in the list.

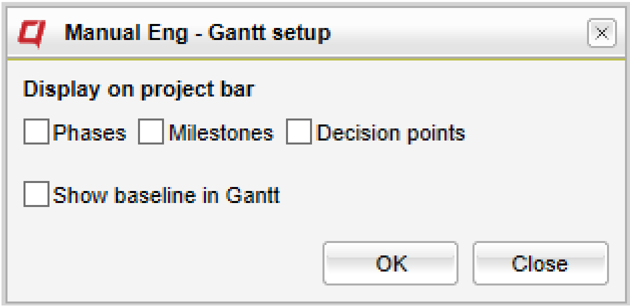



*Sort order set up*

**Gantt Set up**
There are menu choices for deciding which period to display in the Gantt chart. It is alsopossible to show week numbers.




It is possible to display phase colours, milestones and decision points on the project row. This is done by clicking the set up icon, .




*Gantt set up*

This is also where it is possible to choose to display the latest baseline in the Gantt view. If the Gantt is displayed, it will show up as a red line above each phase.

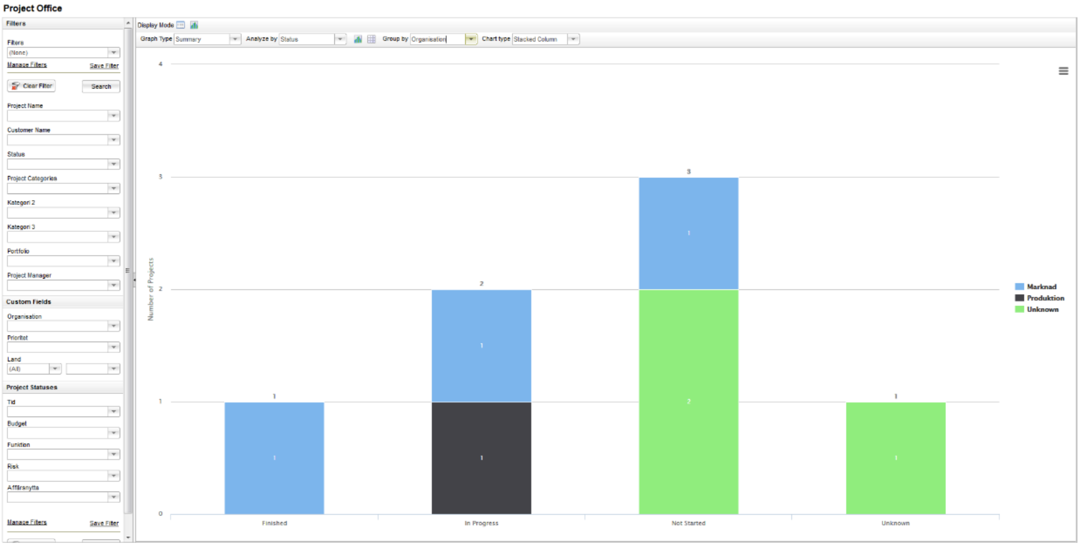

*Baseline in Gantt*

## *Charts*

You can view the projects in the grid or as diagrams. The diagrams can be viewed as sums or bubbles.


*Display modes*

***Summary charts***
The user can choose which parameter the chart should be based on. Optionally group on a second parameter. The chart can be displayed with several chart types, e.g. column, bar, pie.




*Summary chart*

***Bubble charts***

The user can choose which parameter the chart should be based on. Values for the x-axis and y-axis are mandatory. Optionally define which parameter that should be used for the bubbel size. You can also optionally group on one additonal parameter.


*Bubble chart*

# Time Reporting

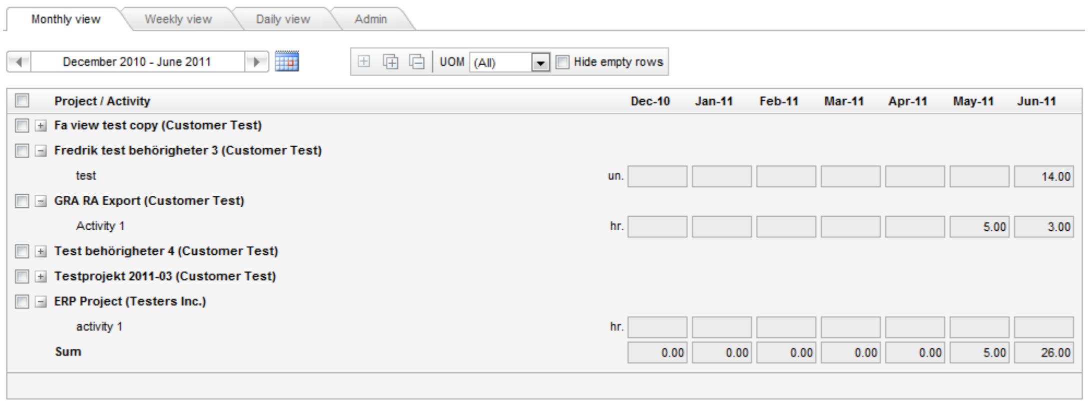
Time Reports is where project members and/or personnel report time (or other units) spent and, if applicable, ETC (Estimate To Complete). Time can be reported on activities and issues.

The time reporting menu has four tabs tabs. Which you see depend on group level permissions.


*Time Report Tabs*

## *Monthly view*

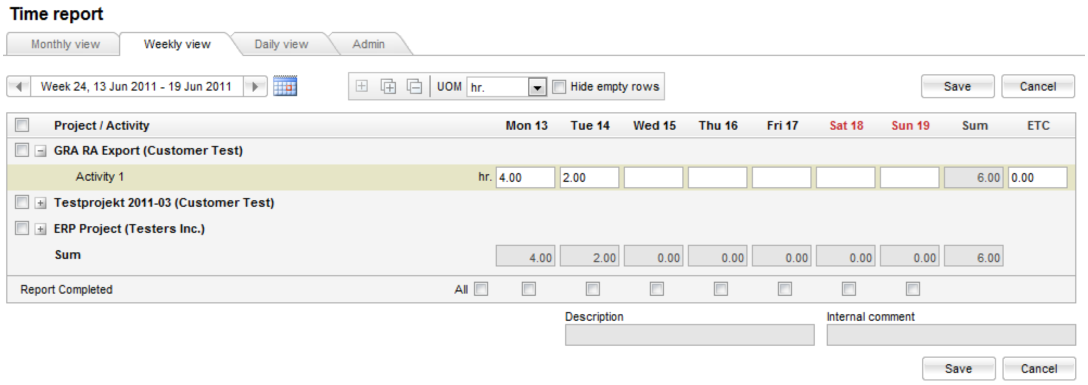
The Monthly view is an overview over your personal time reports the last months. It is a read only view.




*Time Report Monthly View*

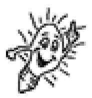
## *Weekly view*

The weekly view is the standard system view since it is the most frequently used view for most organizations. The weekly view makes it possible to quickly report time spent on various activities during the week. There is also a function to report ETC, Estimate To Complete. ETC is used in some projects in order to estimate the time left on a certain activity before it is completed. There is only one ETC for an activity, so the ETC is not affected by a change of weeks.




*Time report weekly view*

When time for a day or a week has been reported, it is possible to use the report complete checkbox in order to give the administrator a signal that no more time will be reported on this day/week. This is useful when, for instance, a Project Manager wants to be sure that a month has been fully reported before summarizing time spent or when a consultancy company is preparing invoices for a specific period.



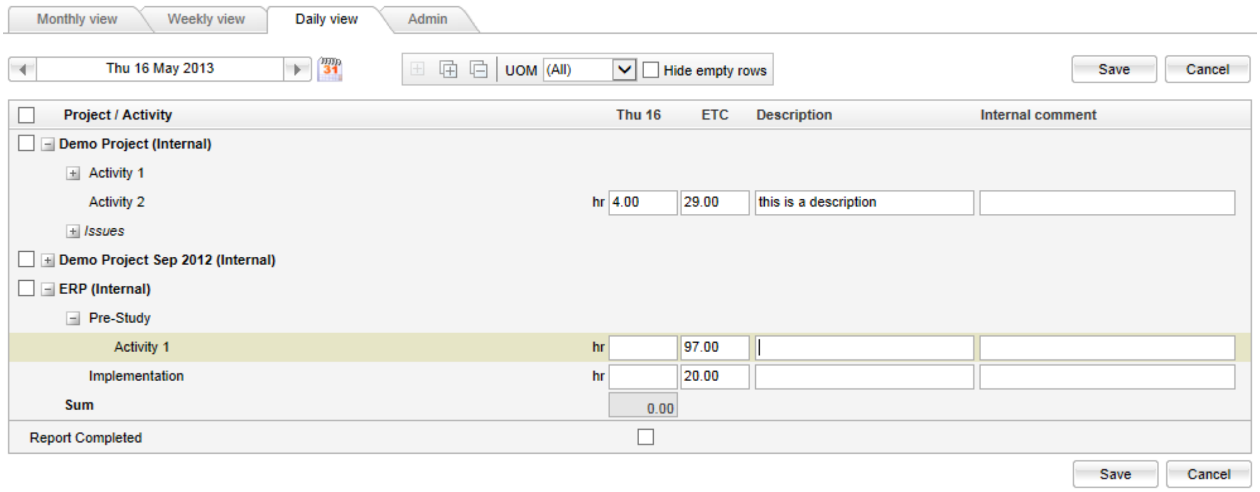
*Once the report complete checkbox has been checked and the time report saved, you need administrator permissions to change time reported.*

It is possible to expand or collapse activities in the tree by clicking on the plus/minus sign to the left of the activitiy. This is useful when you have a large set of activities that you spend time on.

The External and Internal comments fields are linked to the active cell in the time report matrix. By entering comments in these fields, the comments will be saved together with the time entered. You can check this by entering an external or internal comment and then switch to the daily view and choose the same day as in the weekly view.

### *Daily view*

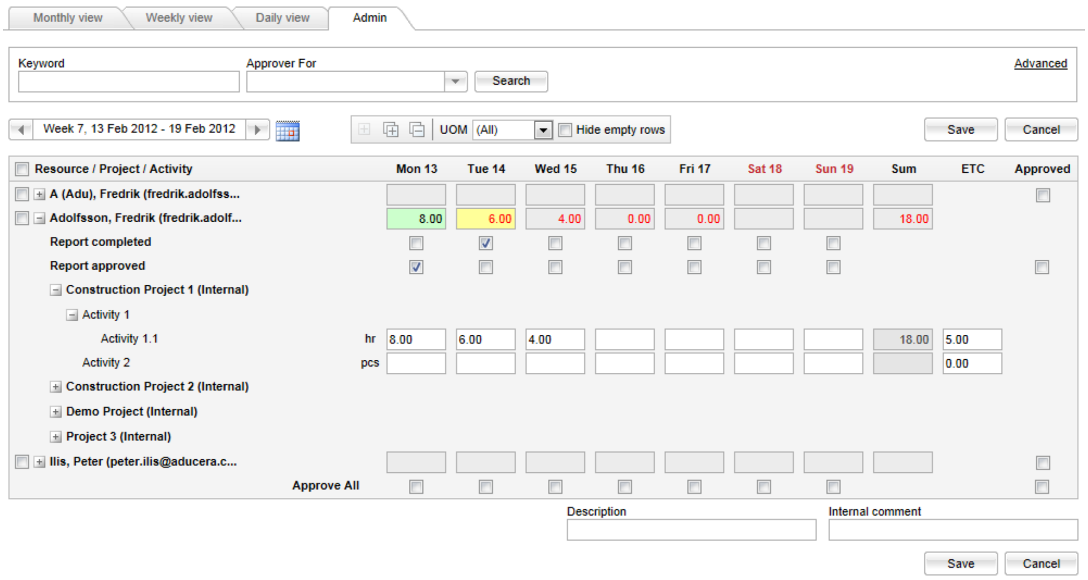
The daily view is used when you frequently want to add comments to the time reported. This is often used in order to give, for instance a customer, more information about time spent on a project.




*Time report daily view*

## *Admin*

The Admin tab is where managers can manage the time reports they have access to. Depending on which responsibility a person has, and which permissions he/she has on a project, he/she will be allowed to do different things on this view.




*Time Report Admin*

Time reports are displayed by resource. It is possible to use the search function to limit the number of resources displayed. A user will see only those time reports that he/she has permission to see. Administrators will always see all time reports.

If a time report for a day is not marked as completed and not marked as approved, the day cell on the Resource level will be grey. If it is completed, it will be yellow, and if it is approved, it will be green. If a person has reported less time than the total available time according to the resource calendar, the time will be shown as red.

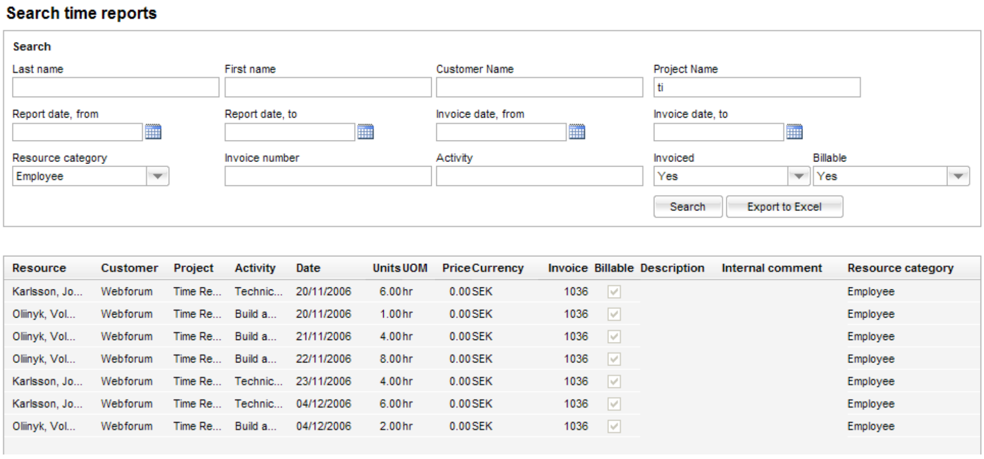
A person with access to the time report admin tab and with update rights on a project may change the time and the ETC a person has reported on that project.

A person with approver rights can approve time reports. A person can be an approver for one or many groups. This is set on the user in the user section on the admin tab. In the system option section, it is possible to set whether an approver has the right to update time reports even without update rights on a project. In the system options, it is also possible to turn the approval function on or off.

Please note that in order for this function to work in a good way, it is better not to mix units of measures (UOM) for a resource. If units are mixed, i.e. in one project time is reported in hours and in another project time is reported in days, it is possible to use the UOM list box in order to see just one UOM at a time.

### Time Report Search

The search menu is used in order to allow detailed search on various combinations of parameters, for instance projects, customers, persons or similar. Search results can be exported to excel.

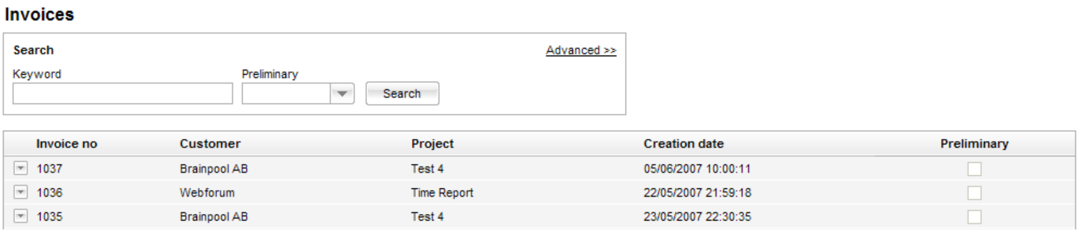



| Resource | Customer | Project | Activity | Date | Units | UOM | Price | Currency | Invoice | Billable | Description | Internal comment | Resource category |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Karlsson, Jo... | Webforum | Time Re... | Technic... | 20/11/2006 | 6.00 | hr | 0.00 | SEK | 1036 | ✓ | | | Employee |
| Oliinyk, Vol... | Webforum | Time Re... | Build a... | 20/11/2006 | 1.00 | hr | 0.00 | SEK | 1036 | ✓ | | | Employee |
| Oliinyk, Vol... | Webforum | Time Re... | Build a... | 21/11/2006 | 4.00 | hr | 0.00 | SEK | 1036 | ✓ | | | Employee |
| Oliinyk, Vol... | Webforum | Time Re... | Build a... | 22/11/2006 | 8.00 | hr | 0.00 | SEK | 1036 | ✓ | | | Employee |
| Karlsson, Jo... | Webforum | Time Re... | Technic... | 23/11/2006 | 4.00 | hr | 0.00 | SEK | 1036 | ✓ | | | Employee |
| Karlsson, Jo... | Webforum | Time Re... | Technic... | 04/12/2006 | 6.00 | hr | 0.00 | SEK | 1036 | ✓ | | | Employee |
| Oliinyk, Vol... | Webforum | Time Re... | Build a... | 04/12/2006 | 2.00 | hr | 0.00 | SEK | 1036 | ✓ | | | Employee |

*Time report search*

### Invoices

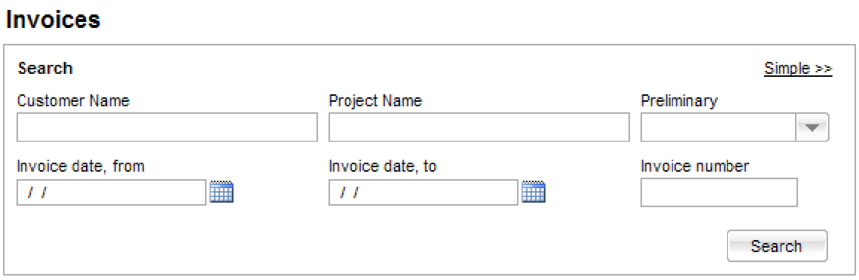
This menu is used in order to manage invoices. Invoices that meet the search criteria entered will be listed in the list box. By default, only preliminary invoices are listed.




| Invoice no | Customer | Project | Creation date | Preliminary |
|---|---|---|---|---|
| 1037 | Brainpool AB | Test 4 | 05/06/2007 10:00:11 | ☐ |
| 1036 | Webforum | Time Report | 22/05/2007 21:59:18 | ☐ |
| 1035 | Brainpool AB | Test 4 | 23/05/2007 22:30:35 | ☐ |

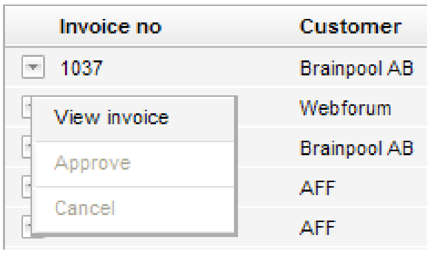
*Invoices*

The simple search function performs a free text search on invoice number, customer name and project name. By pressing the "advanced" button, you will be able to use more detailed search criteria when searching for invoices. By pressing "Simple" after having pressed "Advanced", you will have the simple search function again.




*Invoices created in Webforum Project Management are meant to be used as additional specifications to invoices created in your accounting system. They do not contain such things as company specific information or VAT codes.*

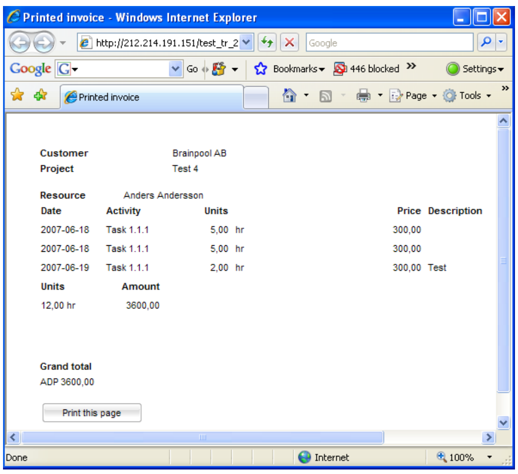
From the listbox it is possible to view, approve and cancel invoices.




*Invoice list*

## View and approve invoices

By selecting "View invoice" you can look at the invoices and print them out.

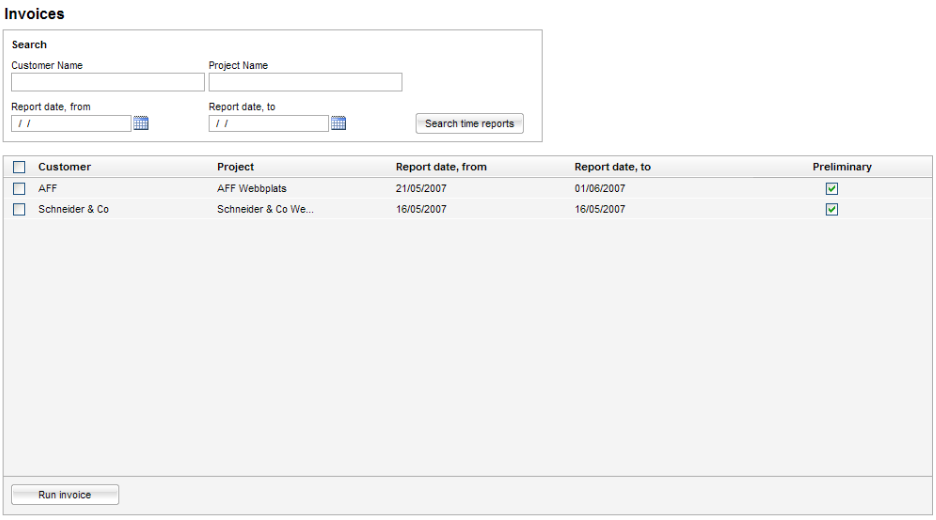



*View invoice*

By selecting ”approve”, the invoice changes status to approved. By selecting “cancel”, preliminary invoices are cancelled. It is not possible to cancel approved invoices.

### *Create Invoices*

This function is used in order to create invoices. Use the search tool in order to find time reports that meet the specified search criteria.




*Create invoices*

Select the projects in the list for which you want to create invoices. Please note that invoices will only be created for days where the user has checked the report completed check box. You may want to check the report completed check boxes for the various time reports before creating invoices. When you press the “run invoice” button, the invoices created will be preliminary if you have chosen to use preliminary invoices when setting up the system. By using preliminary invoice, you can check them before approval.

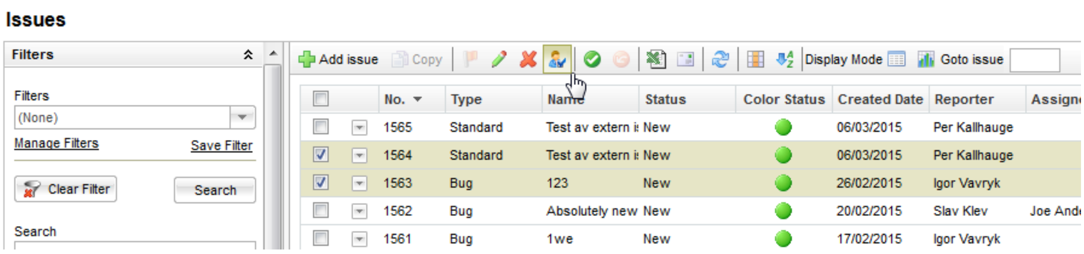
*Please observe that invoicing is always performed on a project level. Approved invoices cannot be deleted, which means that no more time can be reported on the corresponding activities and dates. Issues can currently not be invoiced.*

# Issues

Issues is a top level module as well as a tab for a project. On the top level, it is possible to see and work with issues regardless of project. On the project tab, only issues related to that project are displayed. In addition to the functionality described below, there is also information about issue configuration as well as issue publishing under “Admin”.

### *Issue list page*

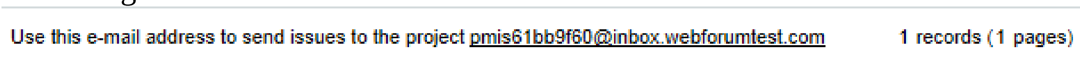
The main page is the issue list page. Here it is possible to filter and sort issues. Read permission on a project is required in order to see issues and update is required in order to create or change issues belonging to a project. Issues without a project can be seen by all users that have access to the issues module.



*Issue list page*

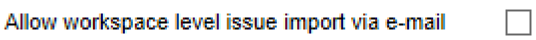
Clicking on a column header will sort the list on that column first.

When viewing issues for a specific project, an e-mail address is displayed at the bottom right corner.




This is the e-mail address that should be used in order to send issues to the project issues module. Issues will have issue type “E-mail” until they have been reclassified. Any attached documents will also be added to the issue.

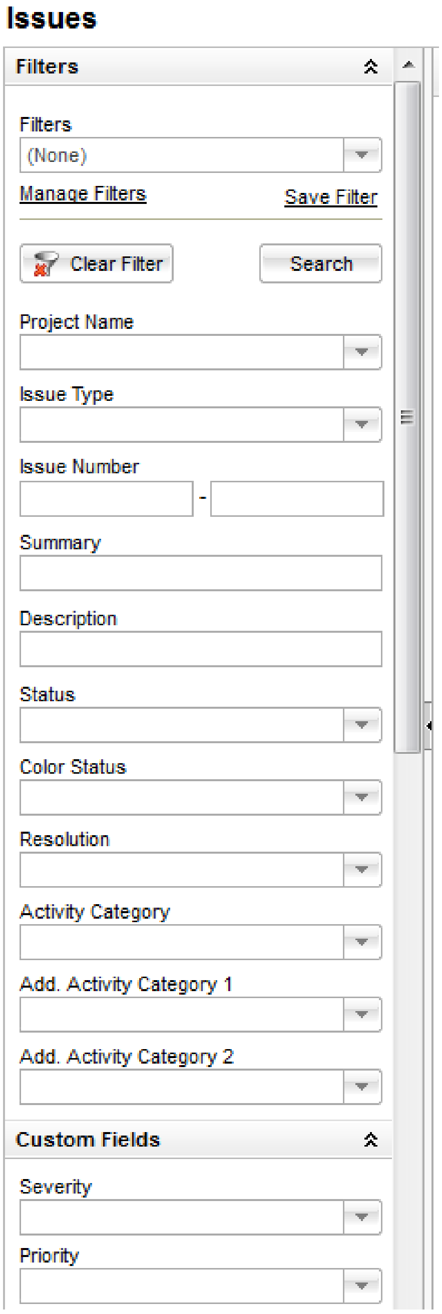
There is no e-mail address displayed when accessing Issues as a top module, unless this has been chosen in System Option.




When chosen, a workspace e-mail address is displayed instead of a project address.

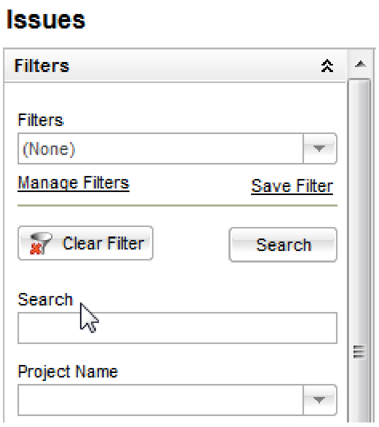
### Filters

Use the filter panel to search based on filters and to save filters.
Filters are used in order to view a subset of all available issues.




The filter function works almost in the same way as advanced search in the document archive, i.e. it is possible to search on attribute fields and to save filters as private or public. A public filter is visible for all users with at least read access to issues in a certain project.

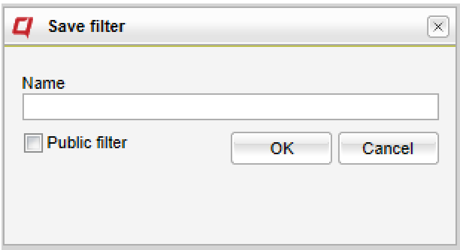
There is a free text search option in the issue list. This means that you can search for a text such as “test” and all issues with test in the searched fields will be listed.




The following fields are included in the free text search:

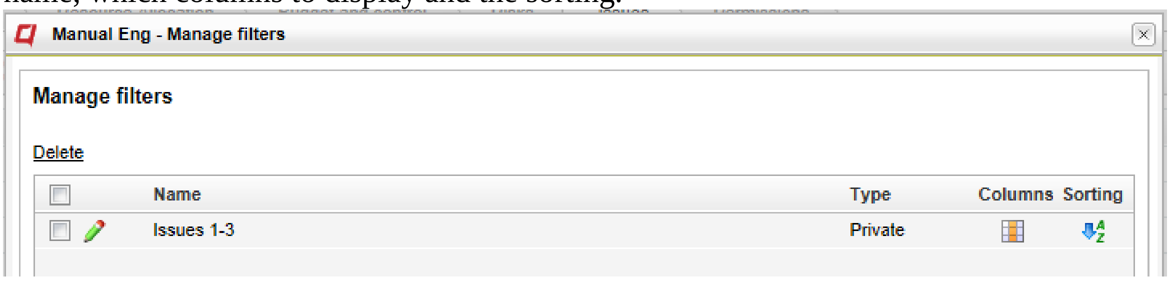
- Issue number (only exact matches. If search on "15", issue #15 will be listed, but not issue #150 or #115.)
- Summary
- Description
- Activity Category
- Additional category 1
- Additional category 2
- Comments Custom fields of type text and pick list (both Activity Custom Fields and Issue Specific Custom Fields)

When a filter is saved, the column selection and the sorting is also saved.




*Save filter*

Clicking “Manage Filters” opens a window where it is possible to change the filter name, which columns to display and the sorting.



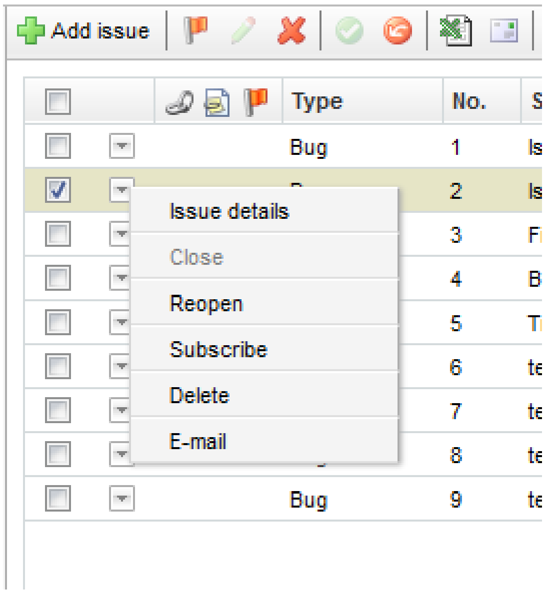

*Save filter*

## Issues Toolbar

There are a number of options in the issues toolbar:


| Icon | Description |
|---|---|
| | Add new issue |
| | Subscribe on issue |
| | Mass update issues |
| | Delete issues |
| | Assign issues |
| | Close issues |
| | Reopen issues |
| | Export to excel |
| | E-mail issues |
| | Refresh the screen |
| | Column selection |
| | Sorting |
| | Display mode list |
| | Display mode graph |
| Goto Issue | Takes you directly to the details page of an issue |

Some of the choices are also available in the context menu:

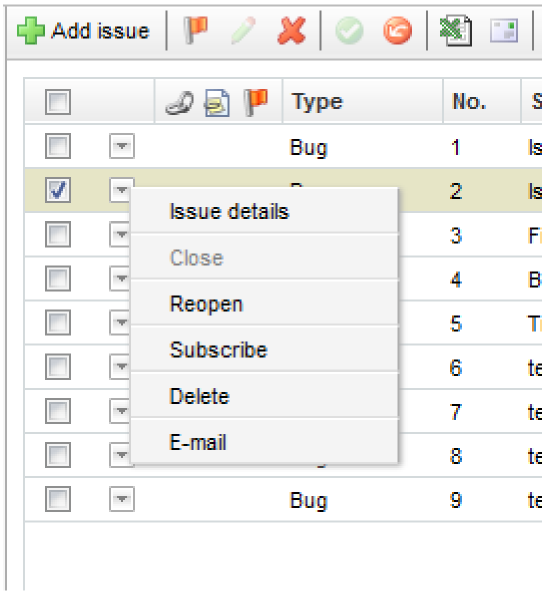



*Context menu*

Click on new in the toolbar to create a new issue. Click on “Issue details” in the context menu or on “No.” in the list in order to open an existing issue. This will take you to the issue details page.

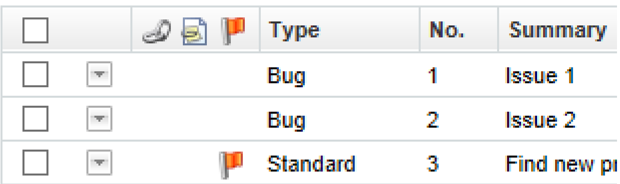
### Subscription

It is possible to subscribe on issues. This is done by pressing the red flag icon in the toolbar or by choosing “Subscribe” in the context menu.




*Issue context menu*

Issues that you subscribe on are marked with a red flag on the corresponding row.



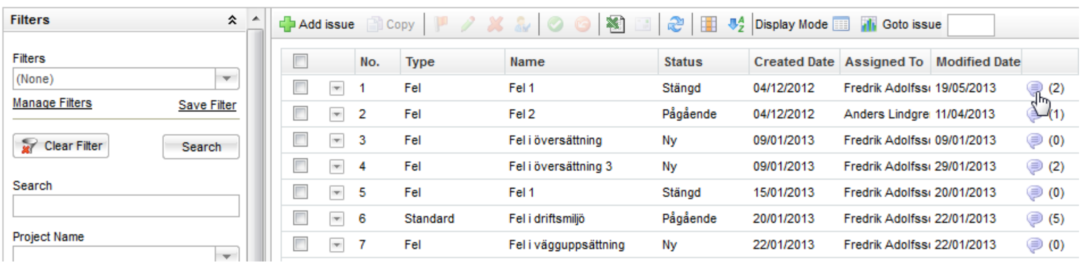

*Subscription*

### *Comments in the issue list*

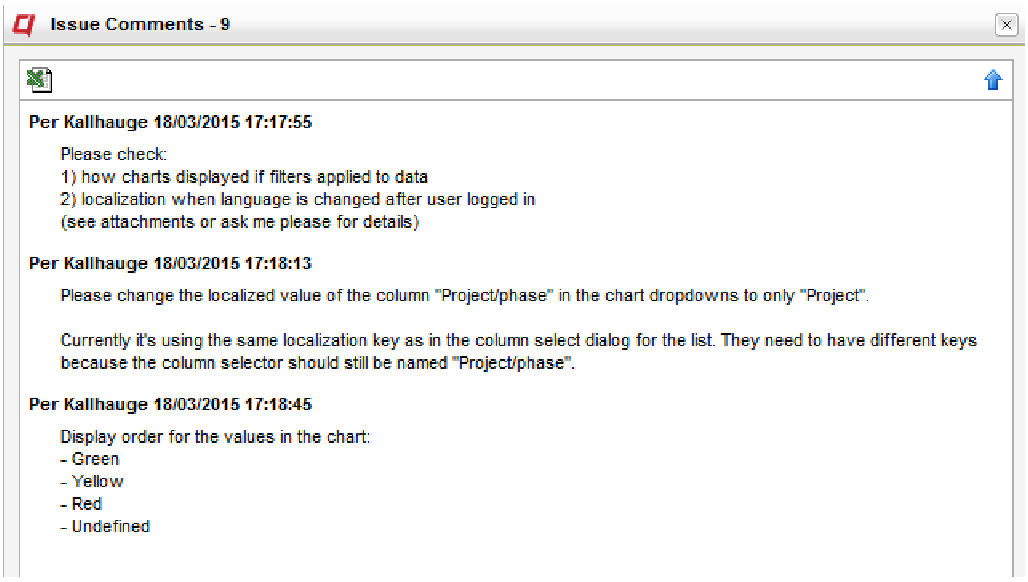
It is possible to display comments as a column in the list.

The content in the column is an icon and also information about the number of comments on each issue. Click on the icon opens a dialog box with the comments.

The comments are included in the Excel export.



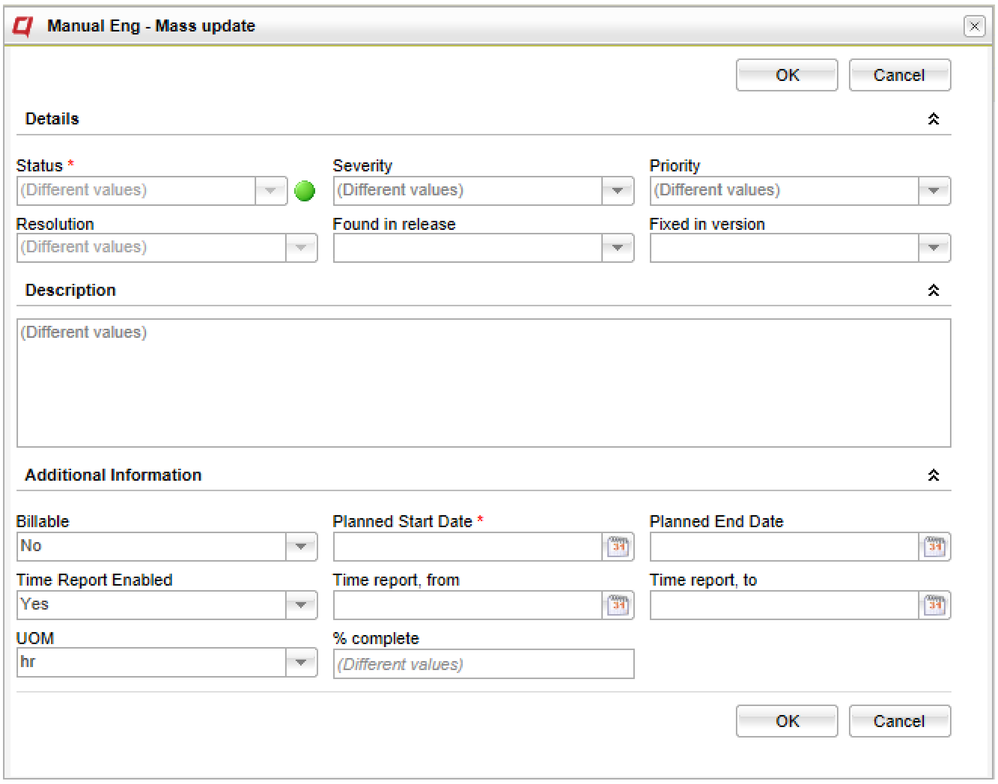

*Comments in the issue list*




*Issue comments dialog*

## Issue Mass Update

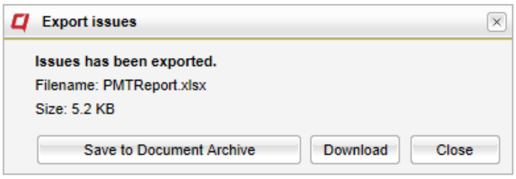
It is possible to mass update issues. This is done by pressing the pen icon in the toolbar after first selecting the issues that you want to update. This opens the Mass update pop up. Here it is possible to choose which fields to update.




*Issue Mass Update Pop Up*

## Export issues

Click the export issues icon in order to export issues to excel or to save them to the document archive as an excel file.




*Export issues*

The export file contains all the issues and columns displayed.

| | A | B | C | D | E | F | G | H | I |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Type | Issue Number | Summary | Severity | Priority | Status | Color Status | Created Date | Reporter |
| 2 | Bug | 1 | Issue 1 | 1 - Critical | 1 - Critical | New | Yellow | 17/12/2012 14:38:43 | Fredrik Adolfsson |
| 3 | Bug | 2 | Issue 2 | 4 - Low | 2 - High | Closed | Green | 17/12/2012 14:39:40 | Fredrik Adolfsson |
| 4 | Standard | 3 | Find new project mana | 3 - Medium | 2 - High | New | Green | 03/01/2013 16:03:37 | Fredrik Adolfsson |
| 5 | Bug | 4 | Bug in logging | 1 - Critical | 1 - Critical | New | Green | 04/01/2013 10:26:16 | Fredrik Adolfsson |

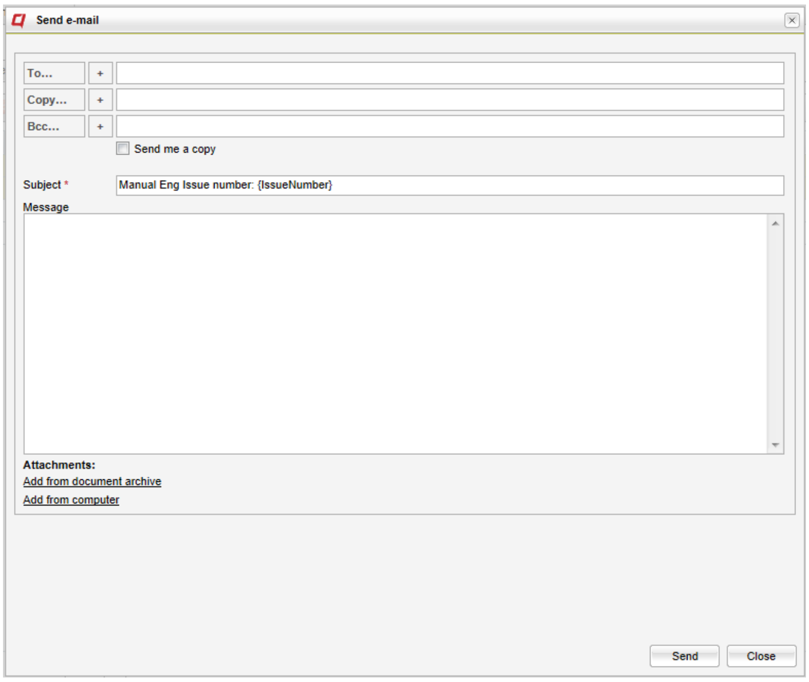
*Export file*

## E-mail issues

Clicking on the e-mail icon opens the “Send e-mail” window. It is possible to write a message and attach documents, just like in other parts of the system.

There will be one e-mail sent for each selected issue and issue details, comments and history information will be automatically added to the e-mail.

Issues sent by e-mail are stored in the e-mail archive.

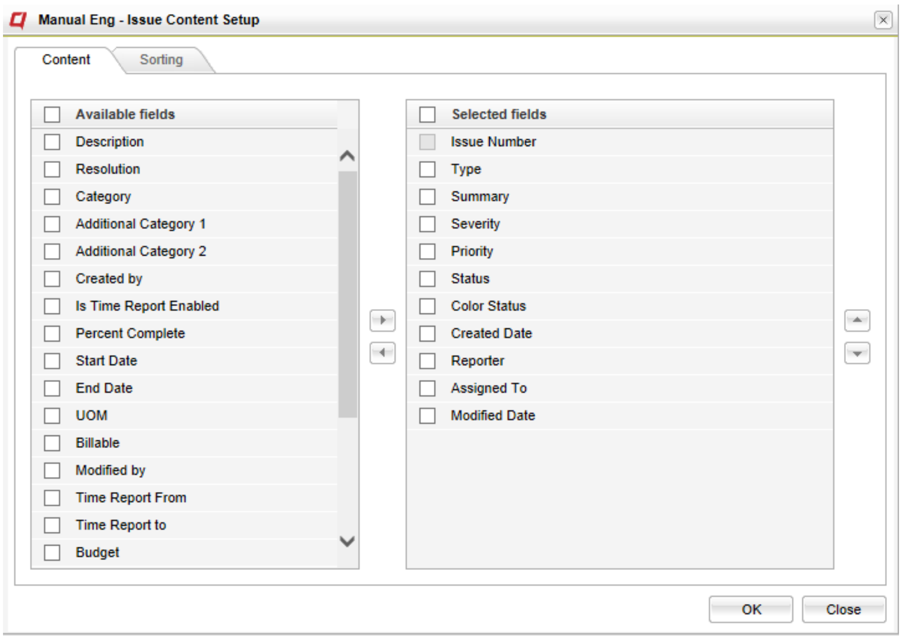



*Send e-mail*

An automatic e-mail will be sent to the assigned person when an issue is updated.

## Column selection

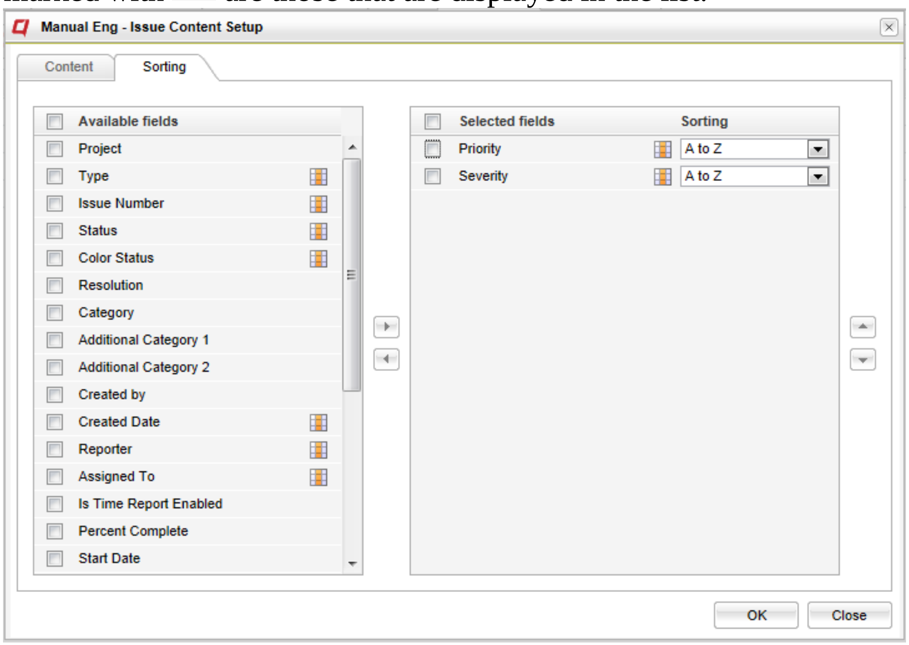
Clicking the column selection icon opens the content setup window with the Content tab open. Choose which fields to display in the list by selecting them and moving them to the right hand side. Issue number is always displayed.




*Field selection*

## Sorting

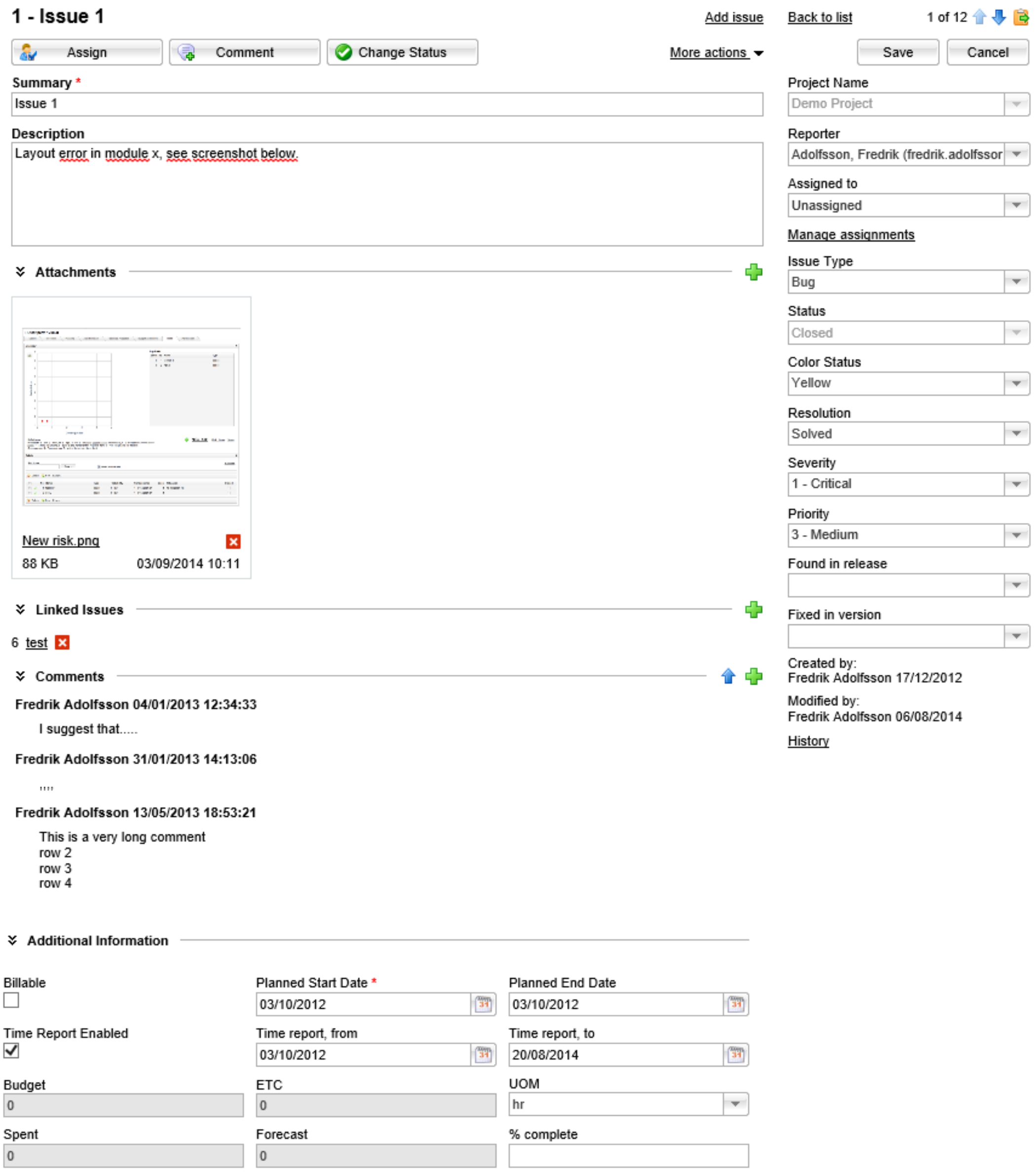
Clicking the sort icon takes you to the sorting set up tab. Choose the field that you want to sort on. It is possible to sort on fields that are not displayed. Fields marked with are those that are displayed in the list.




*Sorting*

## *Issue details page*

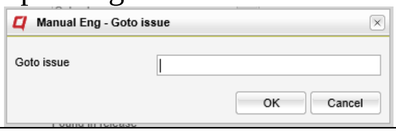
Here it is possible to register information related to an issue, write comments and to assign issues.



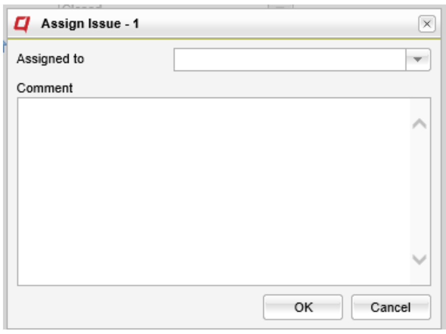

*The issues details page*

## Menu row items


"**Add issue**" will add another issue.
"**Back to list**" will take you back to the issues list.

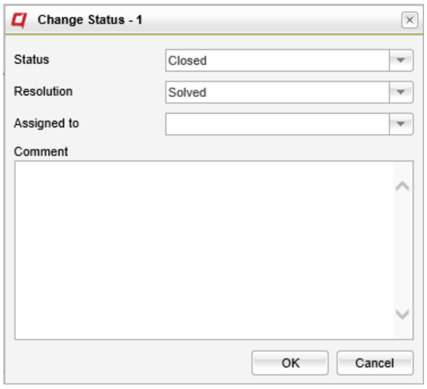
| | |
|---|---|
|  1 of 12 | Will take you to the issue before/after in the list |
|  | Will go to the issue in the GoTo issue pop-up dialog.   |

"**Assign**" will assign the issue to a user of choice via a pop-up window. It is also possible to add a comment.

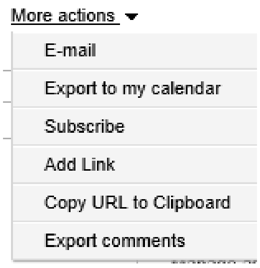



"**Comment**" will add a comment via the comment pop-up window. It is also possible to assign the issue.

"**Change status**" will change the status via a pop-up window where it is also possible to add a resolution, assign the issue and write a comment.




Click "**More actions**" to find additional options;




"**E-mail**" will e-mail the issue. Issues sent by e-mail are stored in the e-mail archive.

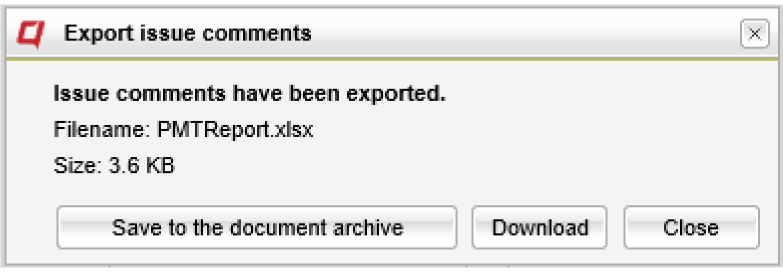
"**Export to my calendar**" will export the issue to a calendar that supports the iCal format.

"**Subscribe**" will add the issue to your subcriptions.

"**Add link**" will add a link to another issue

"**Copy URL to Clipboard**" will copy the URL so it can be pasted into an e-mail or similar thus giving a direct link to the issue.

"**Export comments**" will export all the comments to an excel file that can be saved to the document archive or downloaded to your computer.




*Issue comment download*

The following fields are also available:

| **Field name** | **Description** |
|---|---|
| Issue number | A system generated unique number for each issue |
| Summary | A summary of what the issue is about |
| Description | A description of the issue |
| Attachments | Linked documents from the document archive or documents attached from the PC |
| Links | Links to other issues |
| Comments | Issue comments. Comments are not possible to change once they are saved. It is possible to sort issues based on dates. The default sort order is newest first. It is also possible to export issues. |
| | |
| **Right pane:** | |
| Project name | Name of the project an issue belongs to (currently not possible to update) |
| Reporter | The person that reported the issue (default the same as the creator, which is system generated) |
| Issue Type | Type of issue |
| Assigned to | The person responsible for handling the issue. An automatic e-mail will be sent to persons assigned to issues. |
| Manage assignments | See Additional Information below |
| Status | The status of the issue (optional) |
| Color Status (icon only) | Click on the icon to change the color status. The color status is indicating if work is going according to plan or not and is set by the user. |
| Resolution | The issue resolution – only available when the status is closed (optional) |
| Created/Modified by/History | System-generated fields for the person created or modifying an issue. History is a history log of all changes to issues, except comments that are logged in the comments section. |
| Category fields | The same category fields as for activities in the project plan (can be hidden) |
| Custom fields | User-defined fields for activities/issues or just issues |
| | |

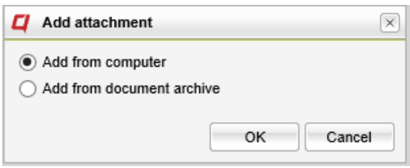
| **Additional info:** | |
|---|---|
| Billable | Indicates if the issue can be billed or not |
| Planned Start/End Date | Set the start and end date for handling the issue. If an |
| Time Report Enabled | Indicates if it is allowed to report time on this issue. If it is, it will show up in the time reporting for assigned resources. |
| Time report from/to | Set the to and from date for reporting time on this issue |
| Budget | The budget in units for this issue |
| ETC | The Estimate To Complete in units for this issue |
| UOM | Unit of Measure for the issue |
| Spent | The number of units reported on the issue |
| Forecast | Spent + ETC |
| % complete | Manual indication of % complete |
| Severity | How severe an issue is (custom field, can be deleted) |
| Priority | Which priority the issue has (custom field, can be deleted) |

### Attachments

It is possible to add a link to documents in the document archive, or to upload files directly from your computer by clicking on the plus sign.

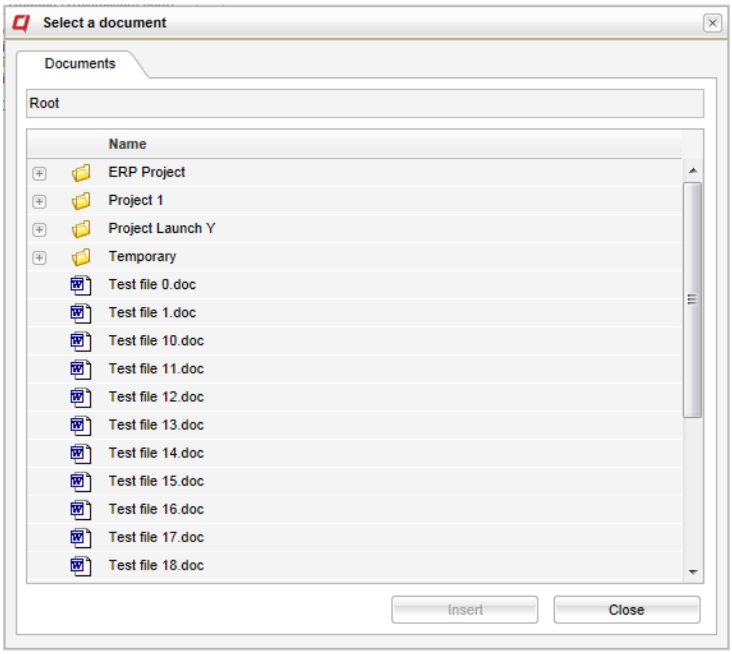

*Add from document archive or computer*

Click “Add from document archive” to open the system standard dialog for linking documents.




*Add files*

Adding a linked document from the document archive means that version changes of that document will automatically be visible when clicking on the link.



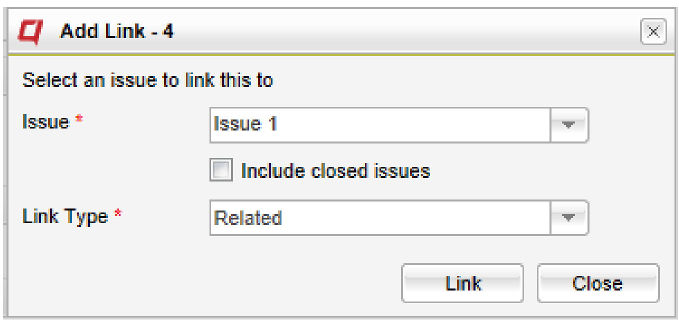

*Link documents dialog*

## Links

By clicking the plus sign it is possible to link an issue to another issue.


*Add link*

The link is a way to visualize that other issues are related to this issue. It is possible to set up user-defined link types, but there is no functionality related to various link types.




*Add link window*

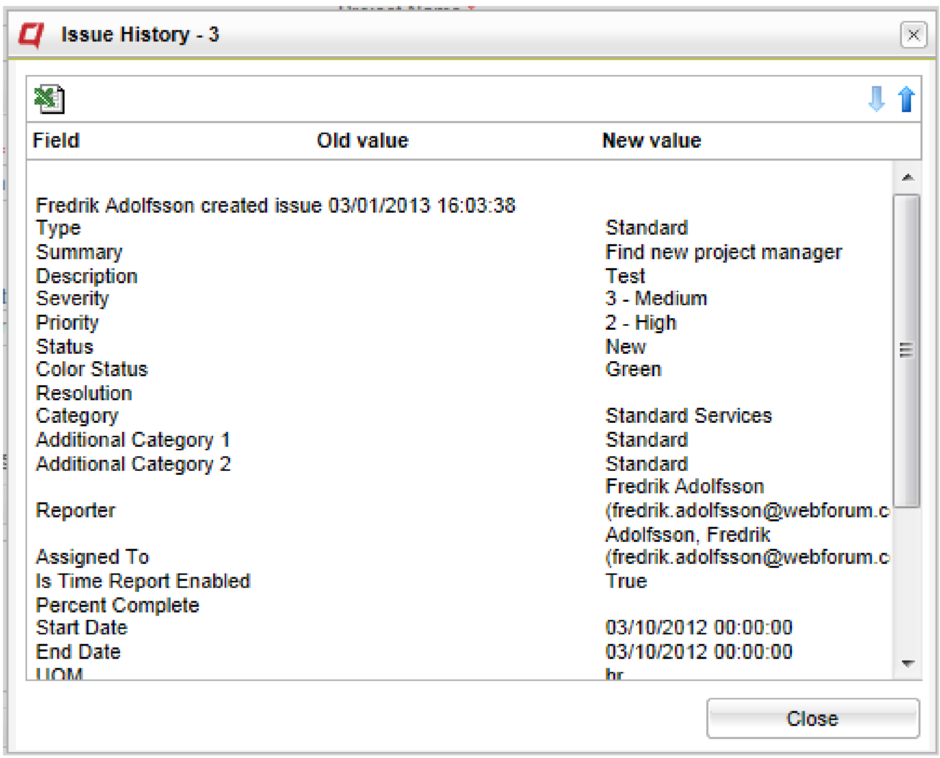
## Comments

Comments are added by pressing the “Add Comment” symbol, . Only one comment at a time can be saved. Saved comments cannot be deleted. The sort order arrow makes it possible to choose sort order. The default sort order is newest first. Comments can be exported by clicking the excel symbol .


*Comments*

## History

The history log shows what has happened to an issue. The history does not show new comments, since they are displayed in the comments section. It is possible to export the history log for an issue.



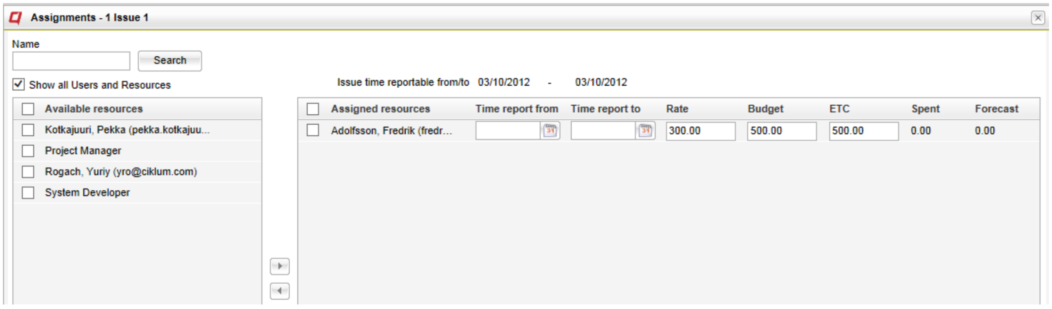

*Issue History*

## Assignments

In order to manage allocations on a resource level, click “Manage assignments” just below “Assigned to”.

*Manage Assignments*

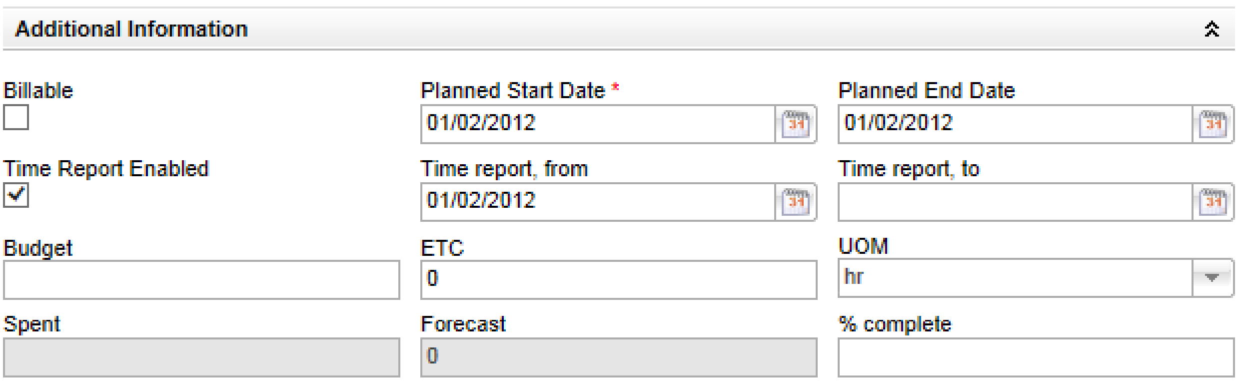
This opens the ”Assignments” page where it is possible to assign more than one person to an issue and to add Budget/ETC on a resource level. Issue assignments function just like activity assignments, i.e. a resource that has reported time cannot be unassigned from an issue.



*Assignments page*

## Additional Information

The Addition Information section contains information related to estimations and reporting. In many aspects, an issue is similar to an activity in a project plan. It is possible to set budget and ETC as well as to report time on issues. Just like activities, issues also have start and end dates and a % complete field.



*Additional information*

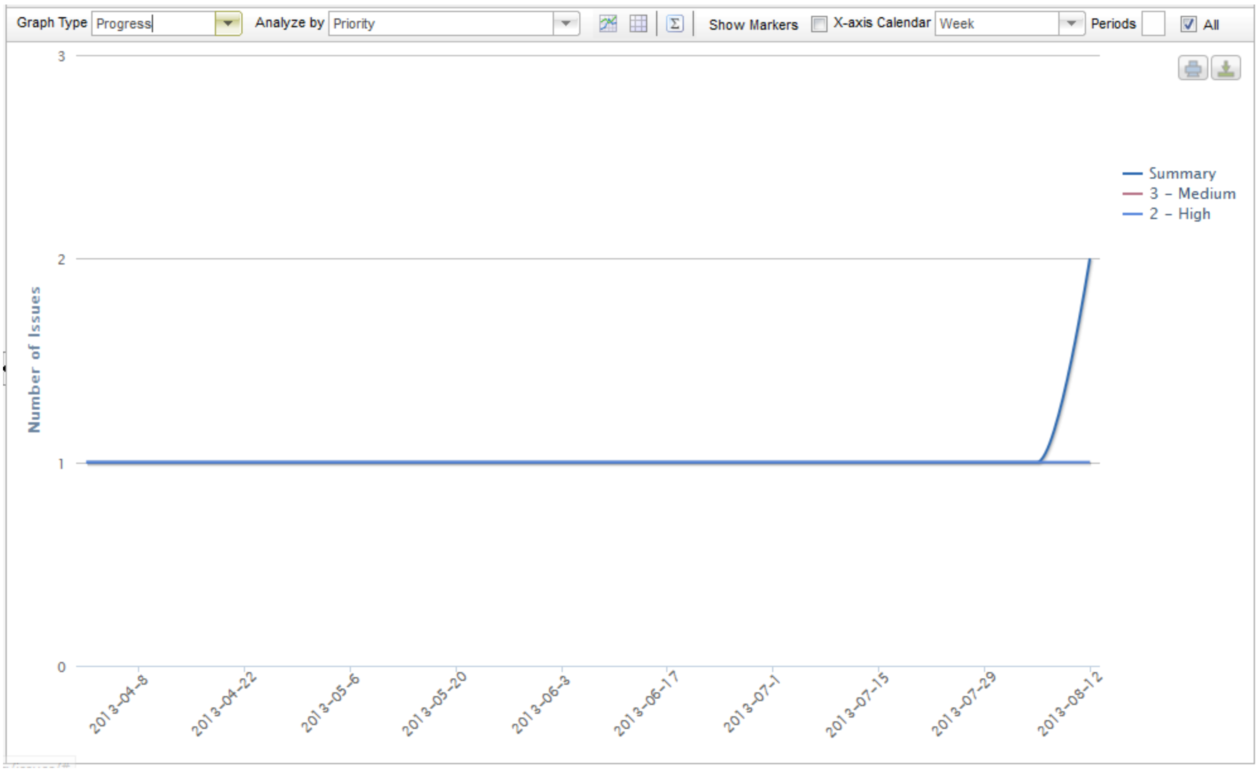
### Charts

Issues can be displayed in a chart mode. Press the chart icon on the issues toolbar to access the chart mode.

In the chart mode it is possible to view statistics related to issues, such as the number of issues by status and time or similar. The filters are still applied when switching to graphs.

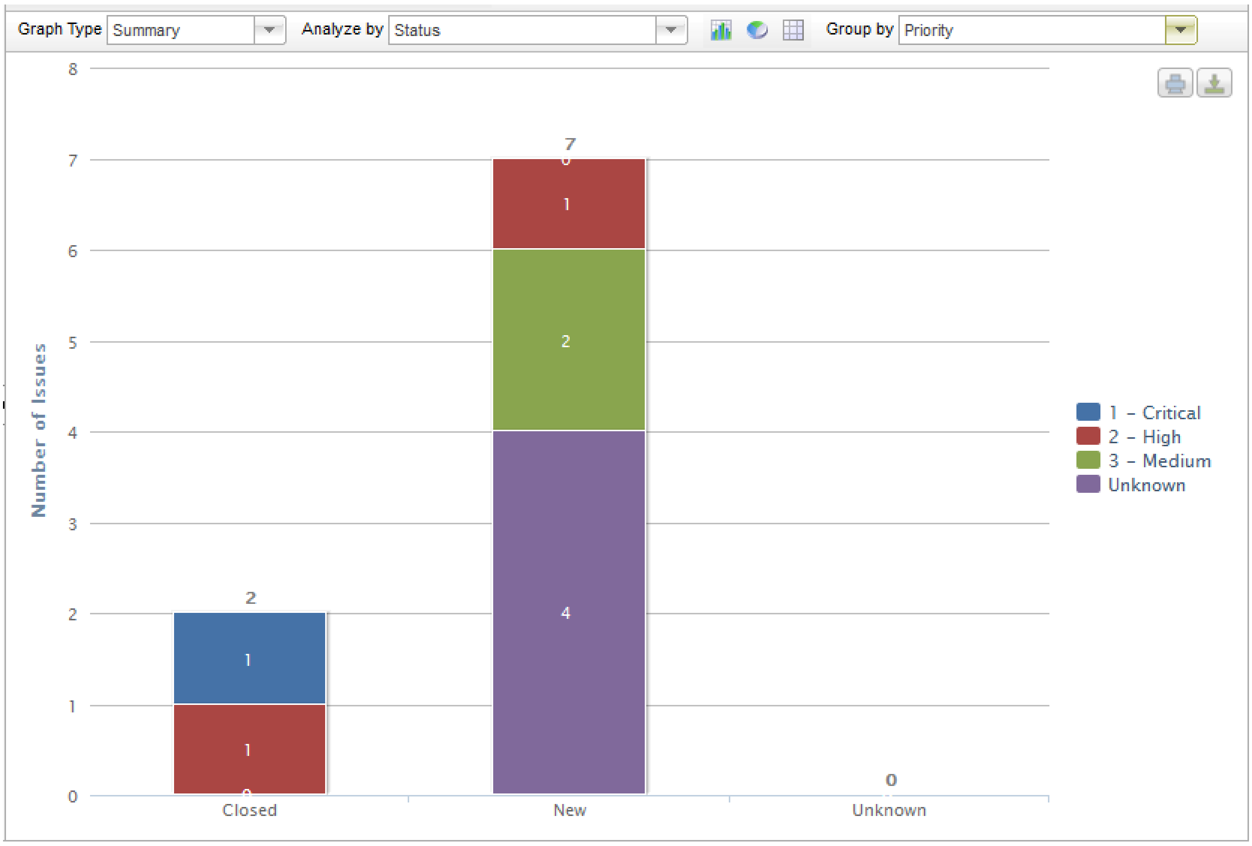
There are two main charts to choose from – progress and summary.

The progress chart shows how the number of issues has evolved over time analyzed by the dimensions of your choice.




*Progress Chart*

The summary chart shows the number of issues analyzed and grouped by the fields of your choice. A summary graph can be displayed in column and pie mode. In pie mode "Group by" is not used.




*Summary chart*

Please also read about the charts in reporting & analysis. Many concepts are similar.

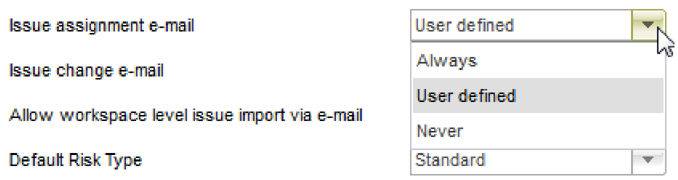
### *Control of issue notification e-mail distribution*

Parameters for control of when an e-mail notification should be sent to a user have been introduced. There are separate parameters for assignment notifications and issue update notifications.

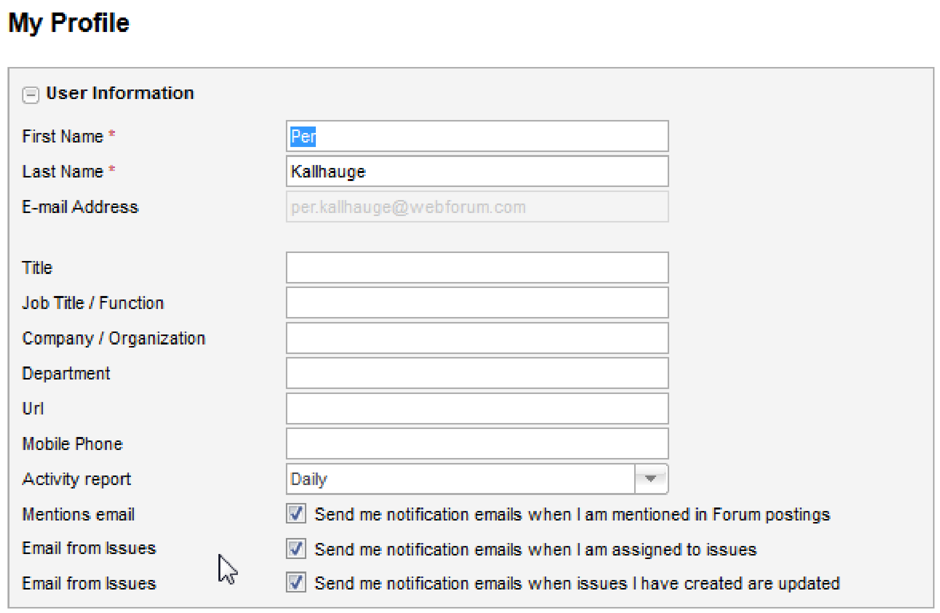
The first level setup is performed in System Options in the Admin tab.

For each of the parameters, the administrator can choose Always, User defined and Never.

If the parameter value User defined has been selected, then each user has the possibility to make an individual setup in the My Profile page. Send notifications is the default value.



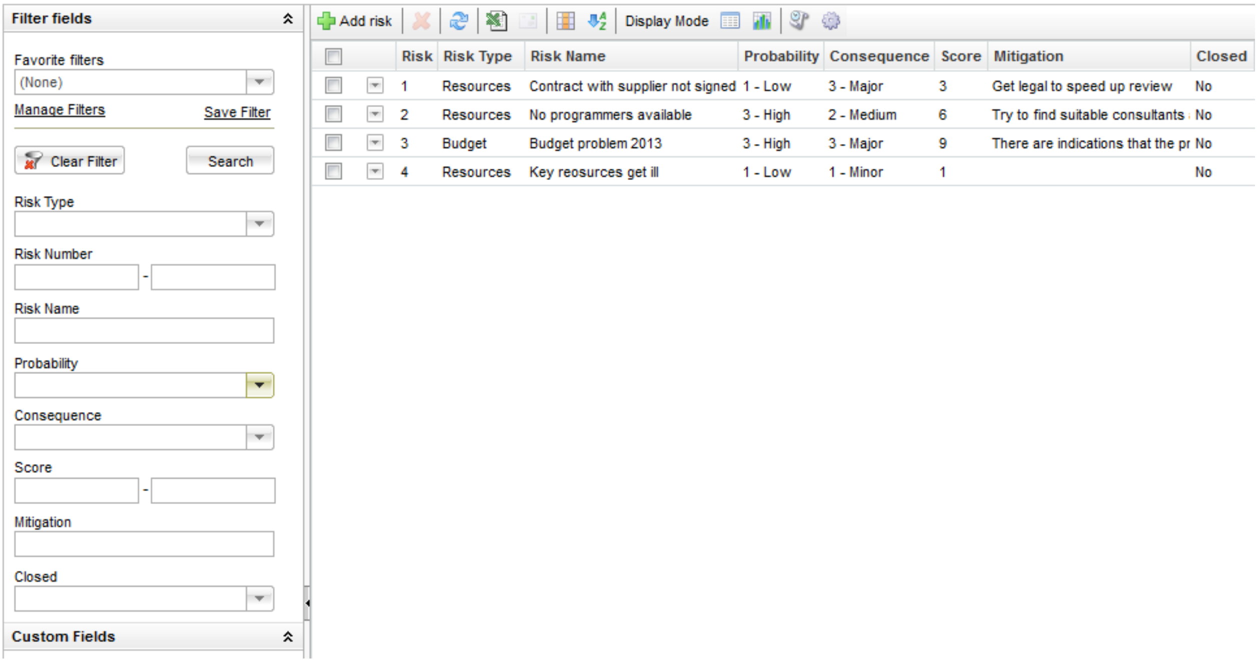

*Setup parameters for e-mail notifications in System Options*




*Setup parameters for e-mail notifications in My Profile*

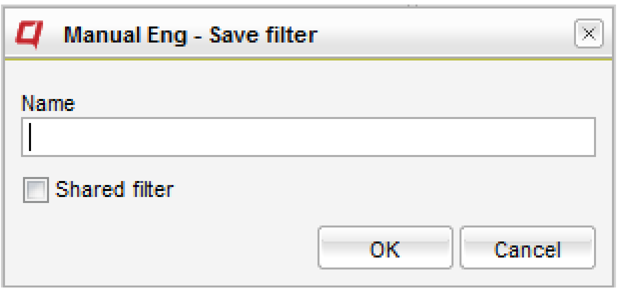
# Risks

Here it is possible to manage project risks. The first view is the risk list that displays all the risks.



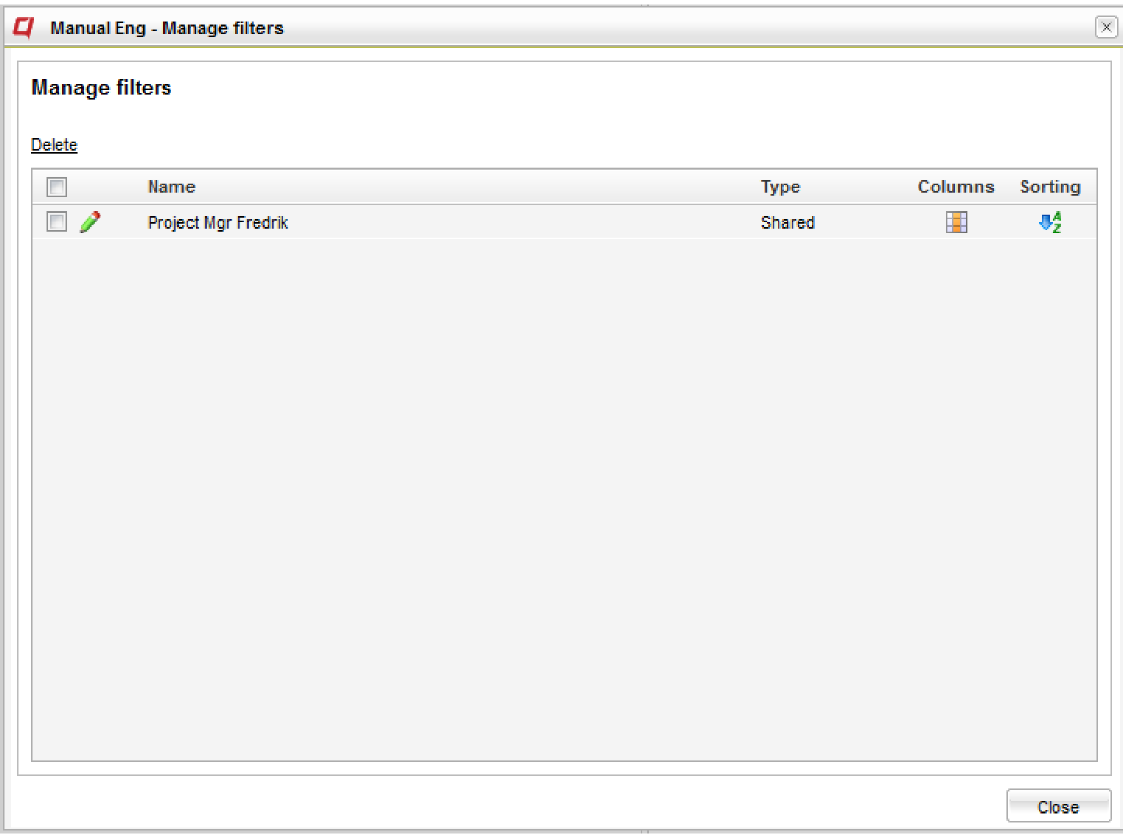
*Risk list*

In the left pane there is a filter function. It is possible to save different filters. When saving a filter, it is possible to choose the “Shared filter” option so that others can use the filter.



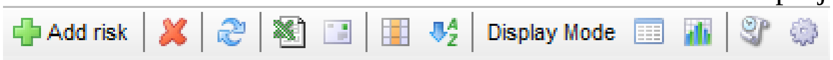
*Save filter*

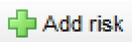
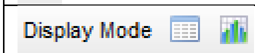
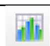
Filters are managed by clicking “Manage filters” in the filter pane. For each filter it is possible to change the columns and sorting order.



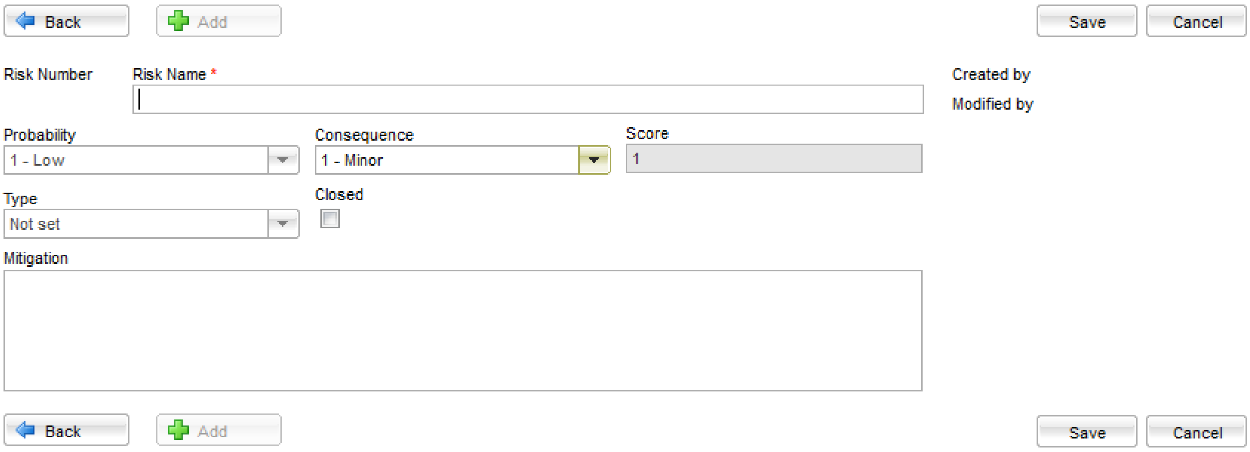

*Manage filters*

The menu choices for the risk list are similar to the ones for projects, issues etc.

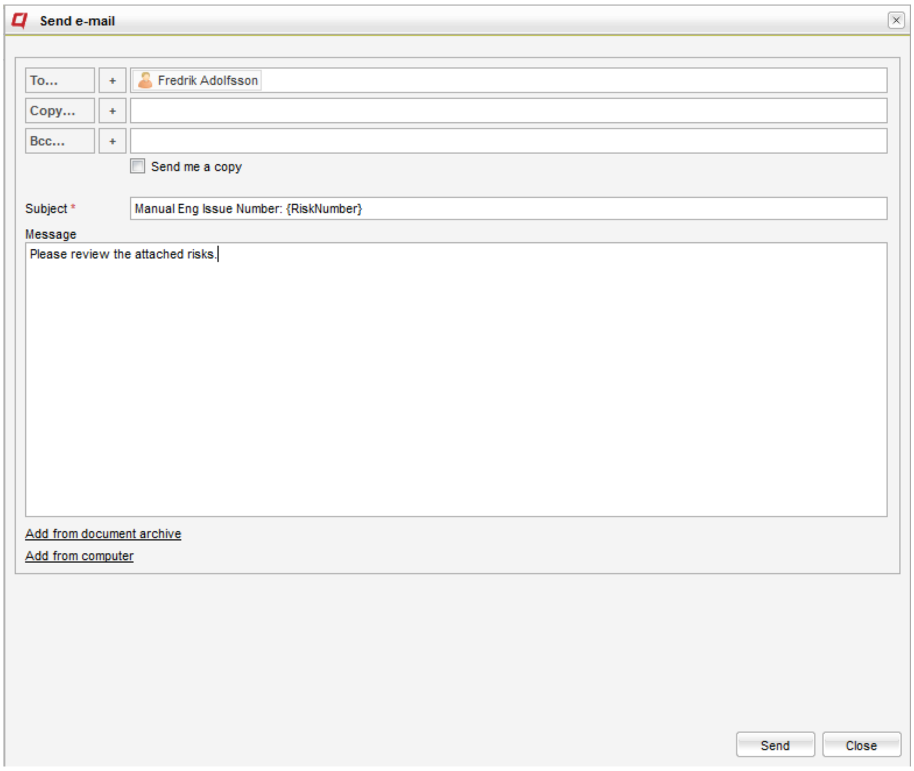



| Icon | Description |
|---|---|
|  | Add a new risk |
|  | Delete selected risks |
|  | Refresh the screen |
|  | Export risks to excel |
|  | E-mail risks |
|  | Risk content - Choose risk columns to display |
|  | Sort risks |
|  | Display as list  or graphs  |
|  | Show risk history |
|  | Risk set up |

**Add risk** opens the details window for the new risk.

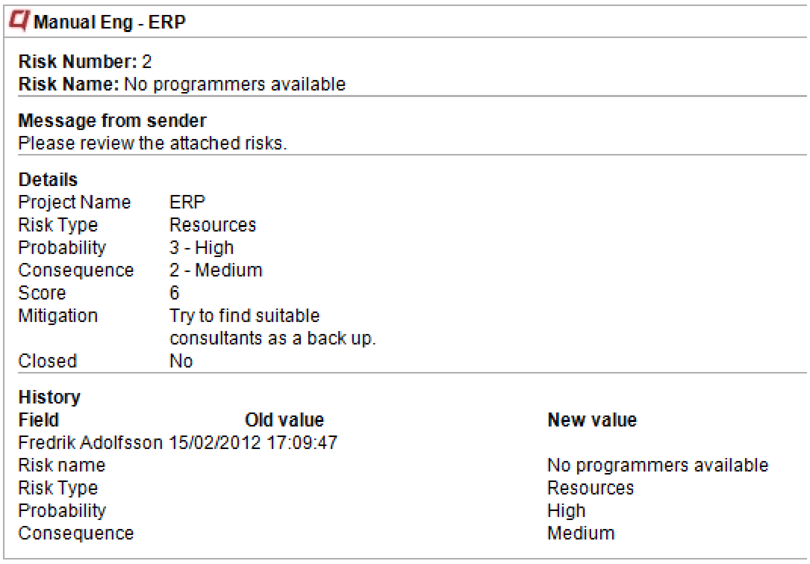



**E-mail risks** – The e-mail dialog will be opened and it is possible to send an e-mail to selected users or other persons.




*E-mail*

The e-mail will contain information about the risk, see below. There will be one e-mail sent for each risk.



**Manual Eng - ERP**

**Risk Number:** 2
**Risk Name:** No programmers available

**Message from sender**
Please review the attached risks.

**Details**

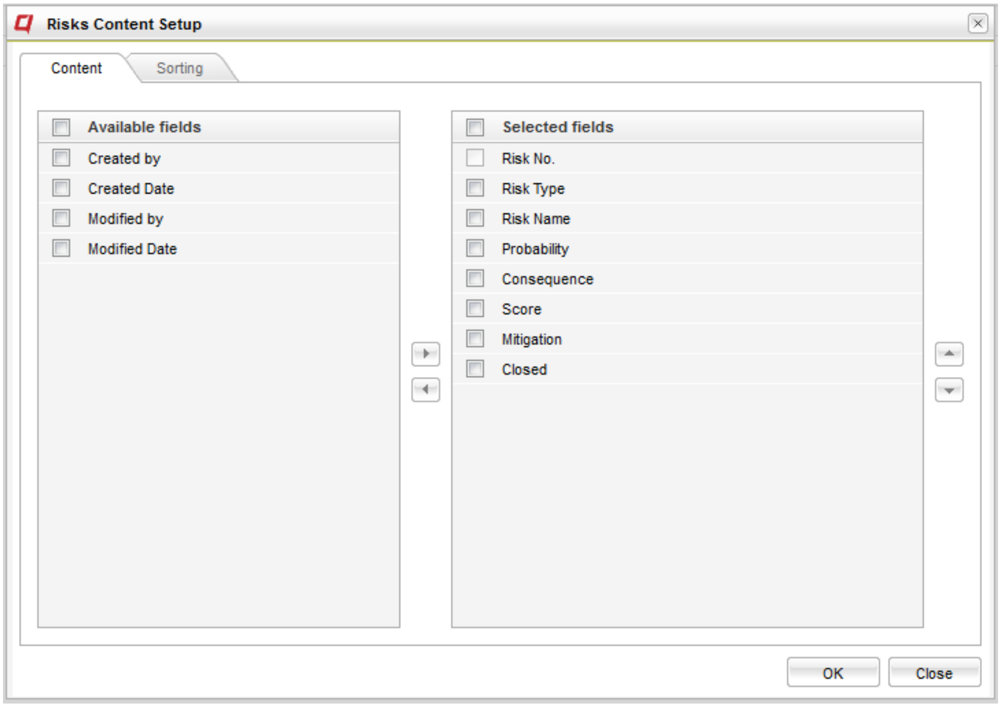
| | |
|---|---|
| Project Name | ERP |
| Risk Type | Resources |
| Probability | 3 - High |
| Consequence | 2 - Medium |
| Score | 6 |
| Mitigation | Try to find suitable consultants as a back up. |
| Closed | No |

**History**

| Field | Old value | New value |
|---|---|---|
| Fredrik Adolfsson 15/02/2012 17:09:47 | | |
| Risk name | | No programmers available |
| Risk Type | | Resources |
| Probability | | High |
| Consequence | | Medium |

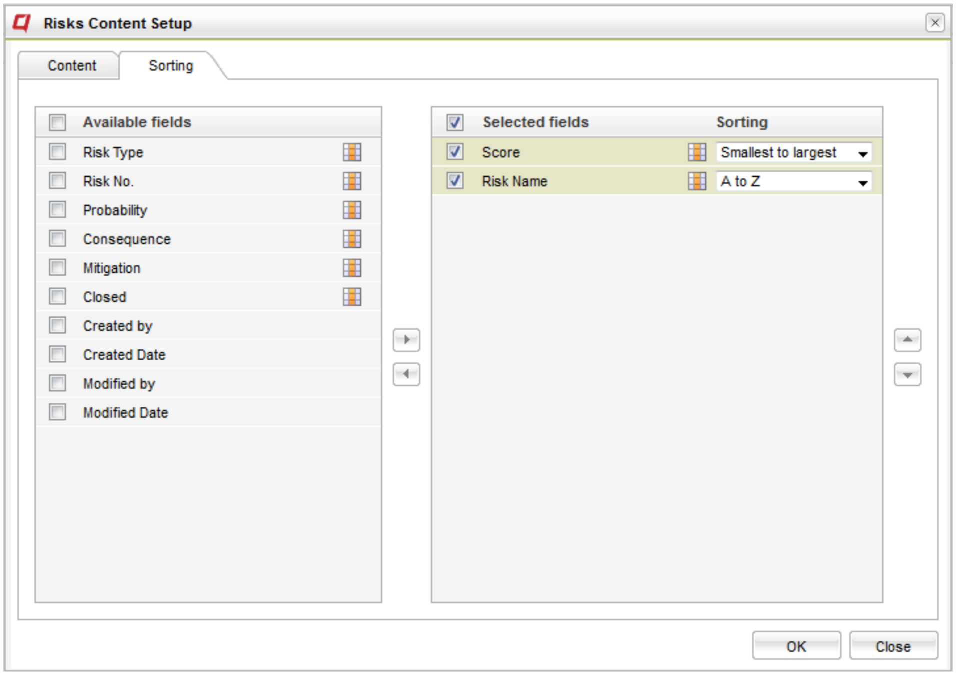
*E-mail*

**Choose columns to display** –
This function makes it possible to choose which columns to show in the list.




*Content*

**Risk Sorting** – this function makes it possible to select the sort order. It is possible to choose from fields that are displayed as well as non-displayed fields.

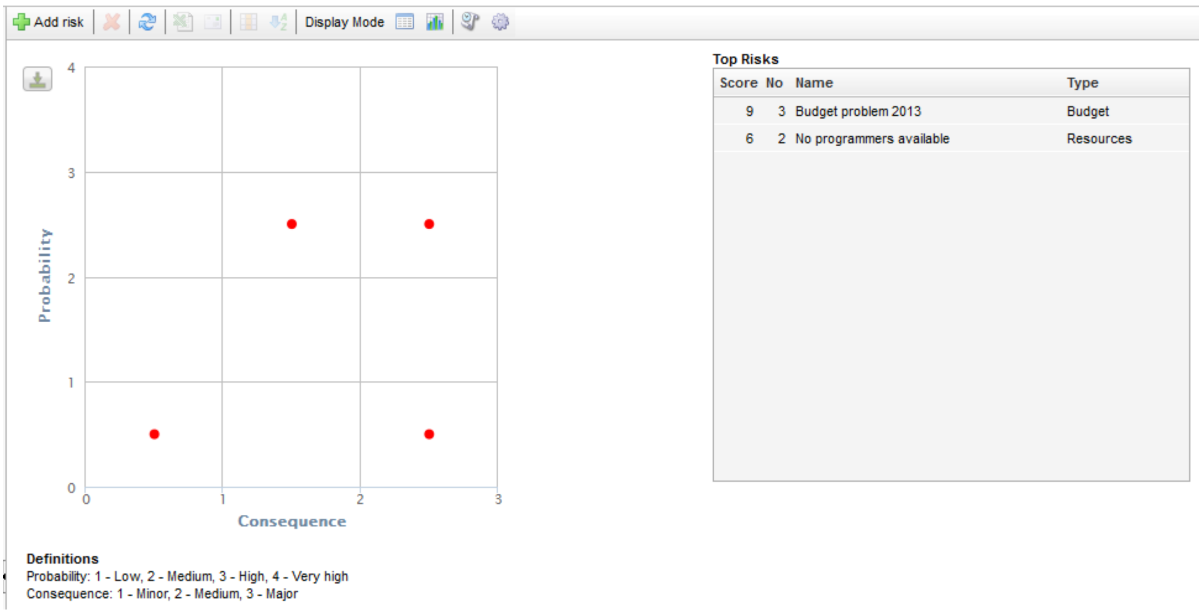


*Risk sorting*

**Display as list or chart.**

The list view  shows the risks as shown above (risk list).

The chart mode  shows top risks. Filters are still valid and can limit the number of risks displayed.

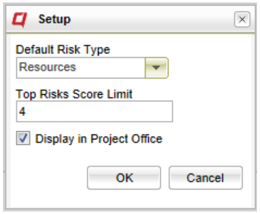


*Graph mode*

**Risk history**  shows the log of changes to all risks.

**Risk set up** – Risk type, top risk score limit and wether to display risks in the Project Office are set.

Top risk limits and the default risk type are both set in the set up pop-up. That is also where it is possible to choose if risks should be displayed in the project office or not.



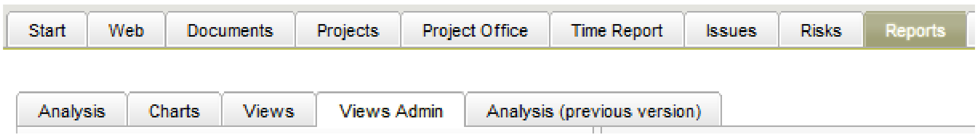

*Risks set up*

# Reports

There is a very flexible reporting function in the system that allows you to create virtually any type of report you want to. The reporting function is described in detail in the advanced reporting appendix. Please note that the reporting function is intended for follow up purposes and the underlying OLAP-cube that is used for this purpose is processed every 15-25 minutes, which means that data entered lately may not be included. The date and time of processing is shown in the reporting tool.

Data is displayed for the current workspace. Please contact Webforum if you are interested in displaying data from multiple workspaces here.

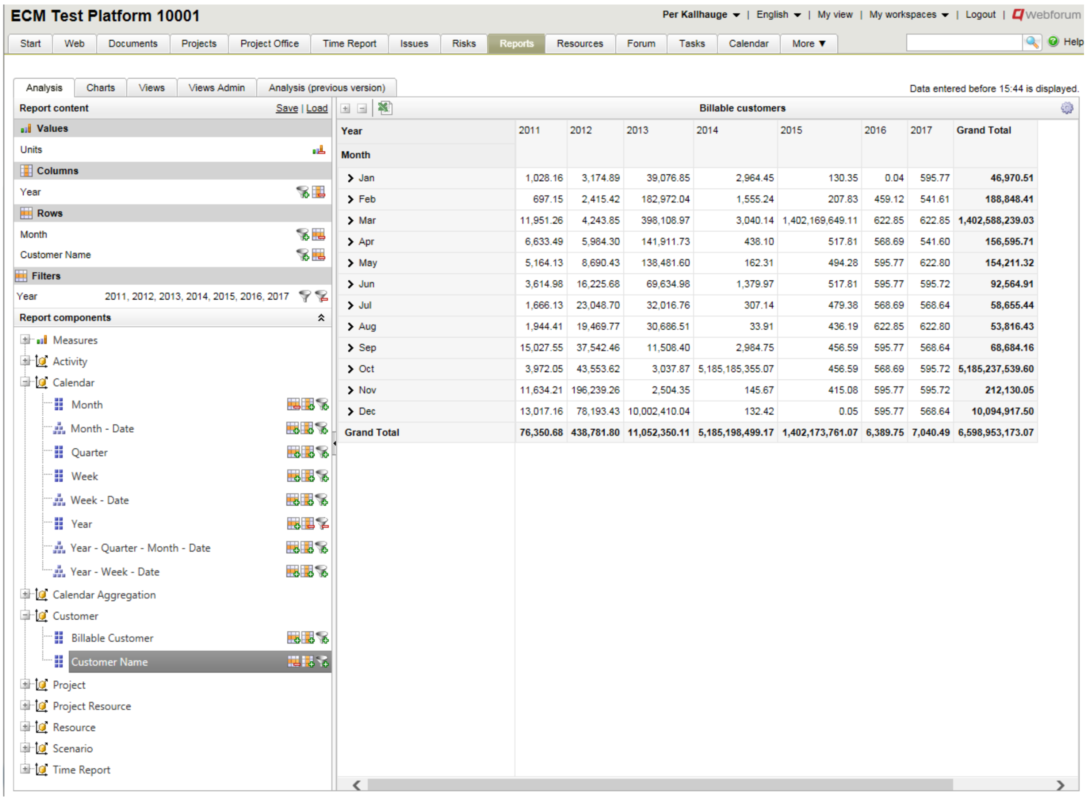
There are five tabs in the reports module. There are three tabs for free analysis, the new analysis function, the charts function and the previous version for analysis. In addition there is a dashboard function called Views. The views are managed in the Views Admin tab.



*Tabs*

## *Analysis*

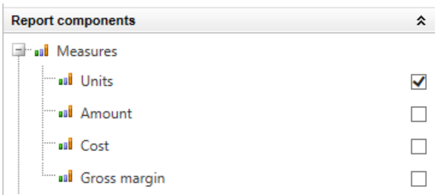
This tool is similar to the old version in terms of layout and general functionality, but it has some extra display options and an improved user interface. The more complex options found in the previous version have been taken away in order to make the function easier to use.




*Analysis tab*

The report content shows which configuration the user has done for current report. The user can decide which measures and dimensions that should be displayed as rows and columns, and the hierarchical order. In addition both displayed and non-displayed dimensions may be used as filters.

Measures are added/removed with the related check box.




Dimensions are added/removed to the report with the row and column icons

Filters are added/removed with the filter icons

Switching of dimensions from/to rows/columns as well as hierarchical order within rows or columns can be done by drag and drop.

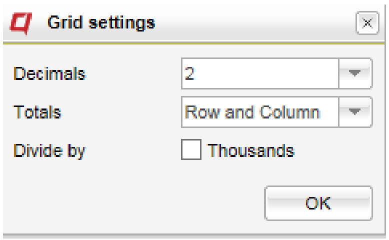
The filter section displays the dimensions that is a part of the filter and which filter members the filter consists of.


The filter dialog is opened with the filter icon

The filter dimension is removed with the delete icon

The rows hierarchy can all at the same time be expanded or collapsed

Click on the Grid settings icon opens the configuration dialog



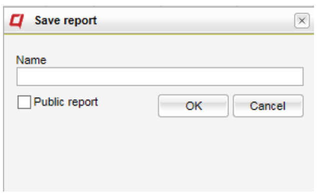

The number of decimals displayed can be selected with the Decimals list box.

The Totals controls if row and column totals should be displayed.

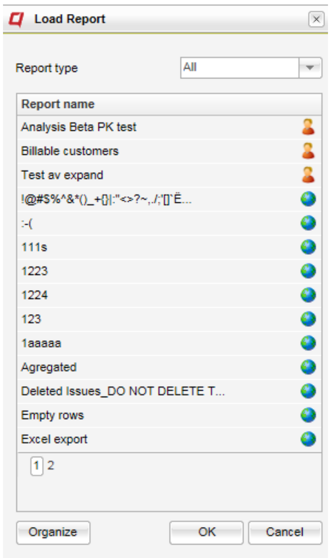
If you want the values to be displayed in thousands, check the Divide by check box.

Current report can be exported to Excel by clicking on the export to Excel icon .

You have the option to save current report. Click on the Save link to open the save dialog.



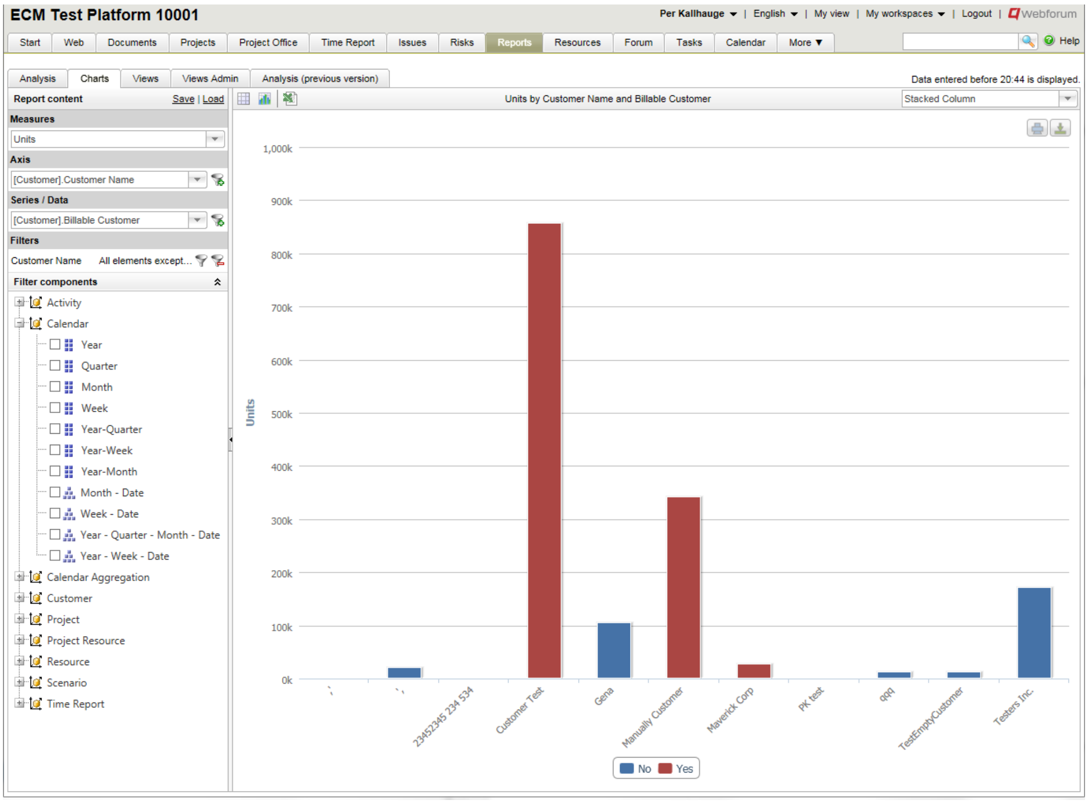

Previously saved reports can be opened with the Load Report function.



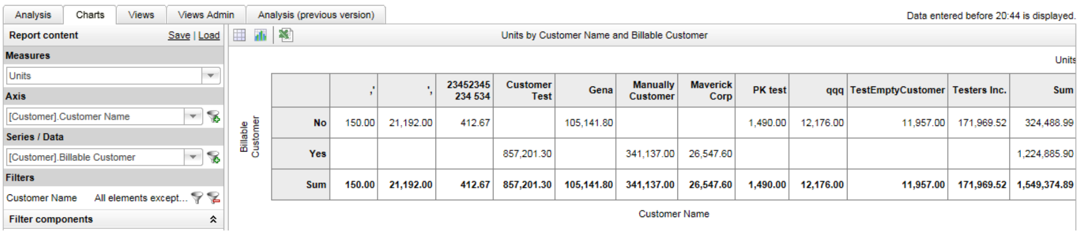

Click on the Organize button in the Load report dialog opens the Organize Reports dialog. In the dialog, the report name can be changed, the Public report flag can be changed and the report can be deleted.

### Charts

The charts function is similar to Reports & Analysis. Charts are also explained in more detail in the Reporting appendix. Charts are also available as a project tab.




*Charts*




| | ;' | ', | 23452345 234 534 | Customer Test | Gena | Manually Customer | Maverick Corp | PK test | qqq | TestEmptyCustomer | Testers Inc. | Sum |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| No | 150.00 | 21,192.00 | 412.67 | | 105,141.80 | | | 1,490.00 | 12,176.00 | 11,957.00 | 171,969.52 | 324,488.99 |
| Yes | | | | 857,201.30 | | 341,137.00 | 26,547.60 | | | | | 1,224,885.90 |
| Sum | 150.00 | 21,192.00 | 412.67 | 857,201.30 | 105,141.80 | 341,137.00 | 26,547.60 | 1,490.00 | 12,176.00 | 11,957.00 | 171,969.52 | 1,549,374.89 |

*Charts in grid mode*

Select the measure that should be used in the chart in the Measures list box

Select the dimension you want to use in the chart, e.g. Year, Project name, Resource name, in the Axis list box.

Optionally group on a second dimension in the Series/Data list box.

Any number of filters can be used for the chart.

There is a number of report styles supported e.g. line, bar, column, pie, area.

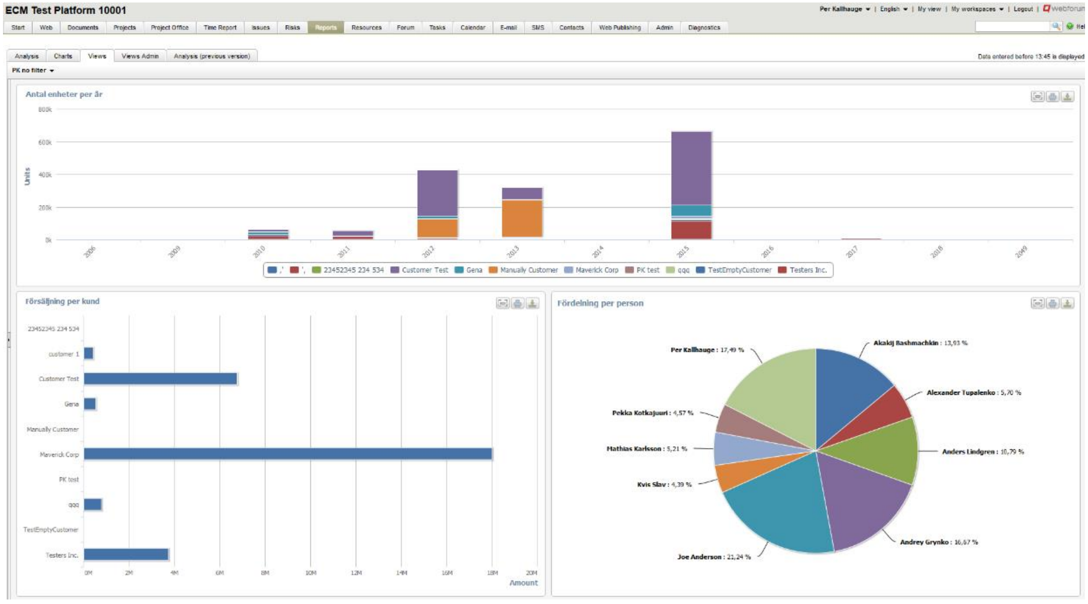
You can also choose to display the chart report in grid format.

Chart reports can be saved, loaded and organized in the same way as for Analysis reports.

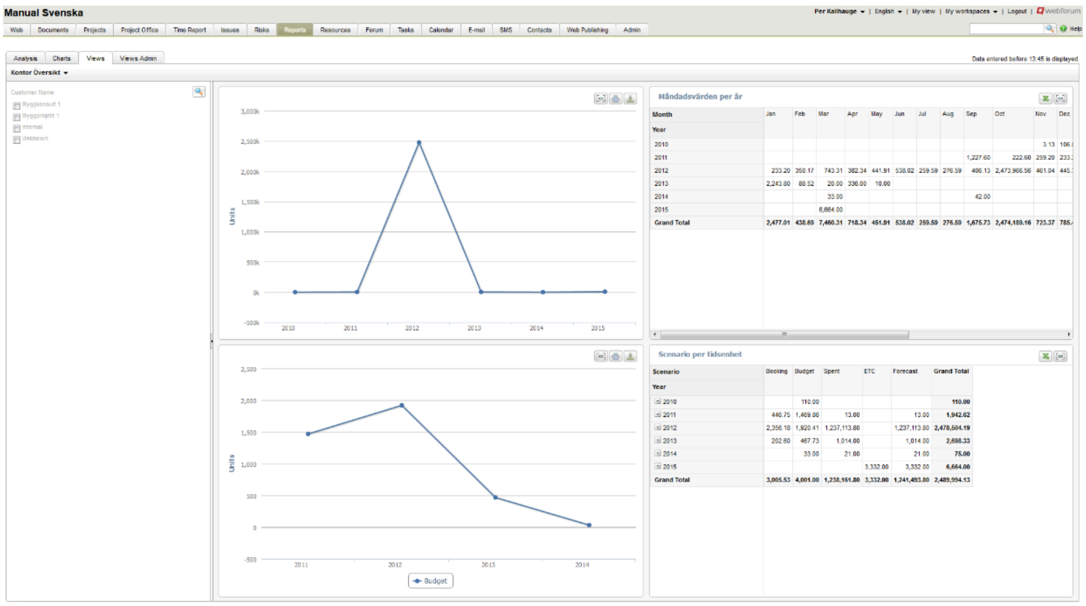
### ***Views (dashboard)***

An administrator can flexibly create report views (dashboard) of project-related data. Data can be displayed and filtered summed across all projects in the workspace.

Any number of views can be defined. Each view can have 1-4 rows and each row may have 1-3 columns. In each cell of the view matrix, individual reports are created. Reports can be of type graphic or data matrix. The views can be added in any order. The same configuration options are available for these reports as for the tabs Analysis and Charts.



*Report view without filter available to the user*



*Report view with filter available to the user*

The top bar contains views available to the user. Select the one to use from the list.

Left pane contains the filters available to the user and the current filter selection.

The splitter between the left and the right pane can be used to close the left pane.

The right pane contains the reports related to current view and according to the view's configured structure.

Expand the report to full screen with the expand icon in the report 

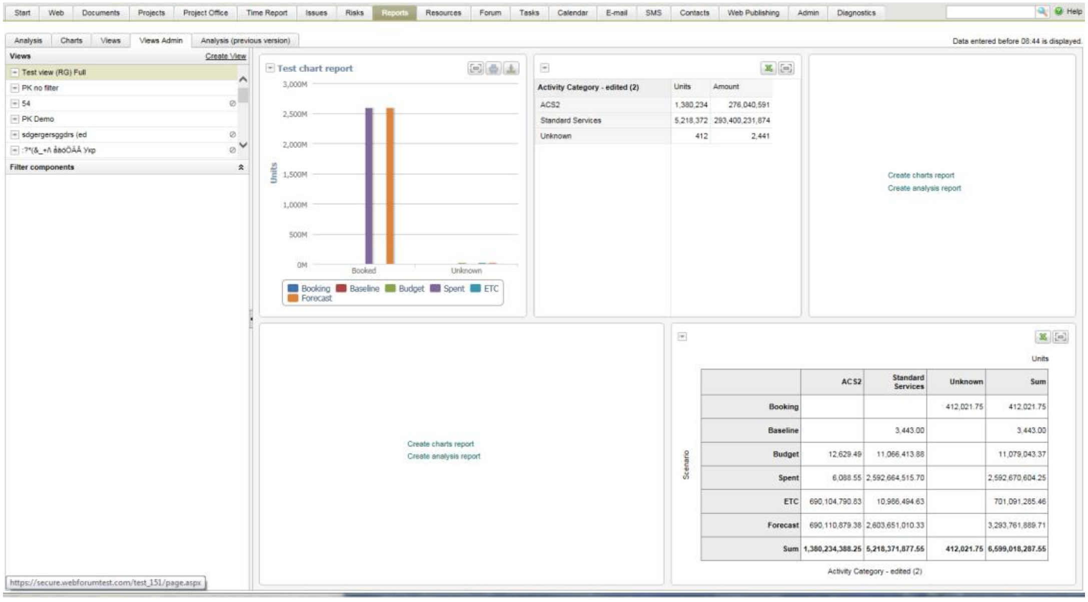
Click on the print icon  to print the chart

Export the chart to a raster or vector based image with the icon.

Grid report can be exported to Excel by using the Excel icon .

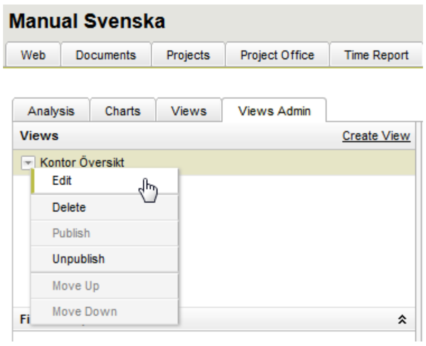
### *Views Admin*

Views are created and administered in the Views Admin tab.



The right pane works the same way as when the dashboard is accessed from the tabs.

Left pane displays the full hierarchy of tabs, views and reports.



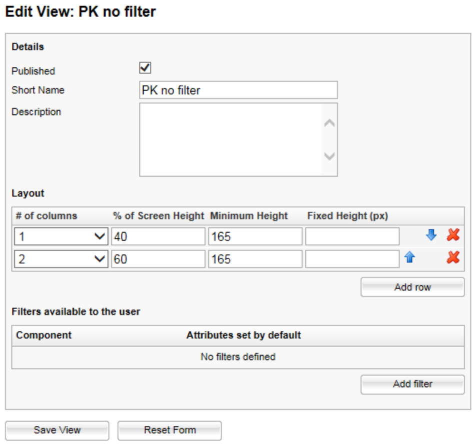

*Views are created and administered under the Views Admin tab*

Create new views with the Crate View text link. The edit view dialog is opened in create mode.

The Edit menu item opens the edit view dialog in edit mode.

Delete menu, deletes the current view. A warning message is displayed.

The view can be published/unpublished and moved up/down with the menu.




*Edit View dialog*

The view can have between 1 and 4 rows and each row can have between 1 and 3 columns. This is entirely user configurable.

The row height is individually controlled by setup parameters. 100% is defined as max available screen height with no scroll. The minimum height parameter controls the minimum height the row will have on a low resolution screen. Fixed height is used if the row should have a height of a specific number of pixels regardless of screen resolution.

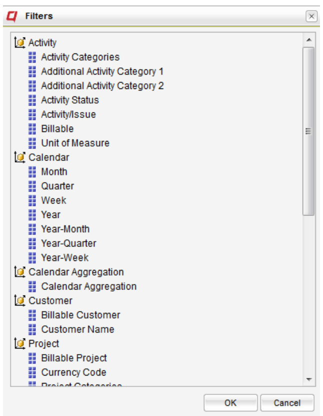
Rows are added with the Add row button.

Rows are deleted the delete icon on each row.

Switch order of the rows are done with the arrows

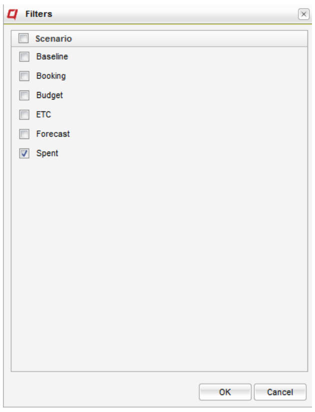
Filters might be added to the view. The filters are applicable for all reports in the view. For each filter dimension, default values can be added.

Filter dimensions are added with the Add filter button.




*Filter dimension dialog*

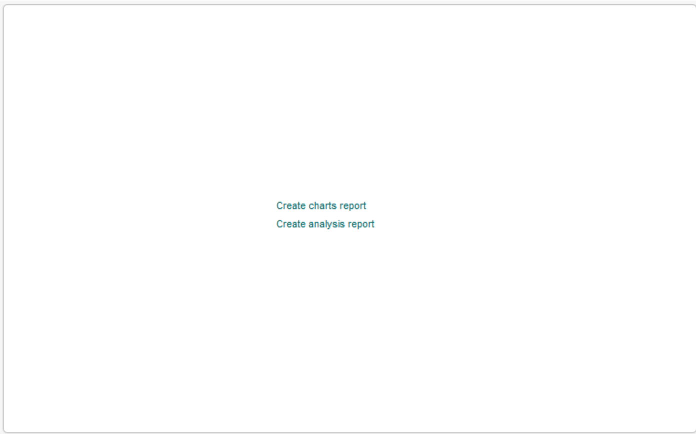
Default values are added/edited with the filter icon. When clicked on, the member selection dialog is opened.



*Member selection dialog*

Filter dimensions are removed with the delete icon.

Reports are added to the view with the text links in the view.



*Create reports with the text links*

Chart reports are created in the same way as in the charts tab.

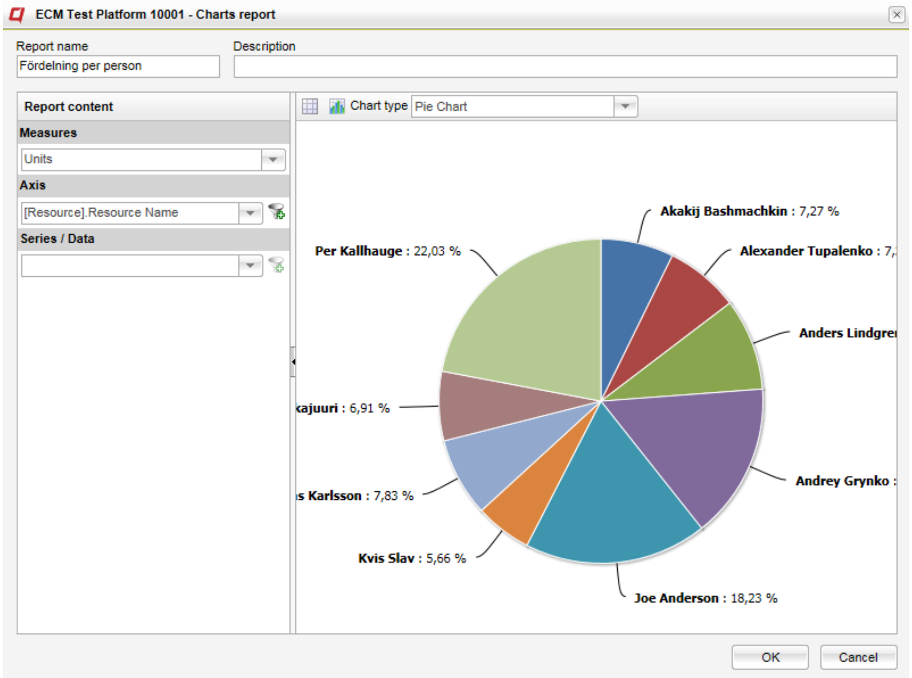
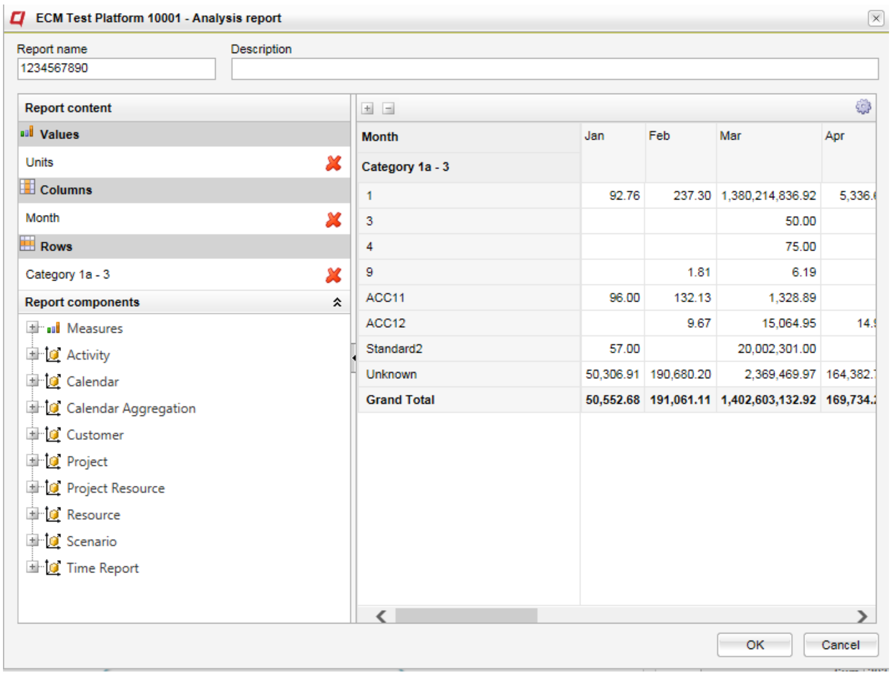


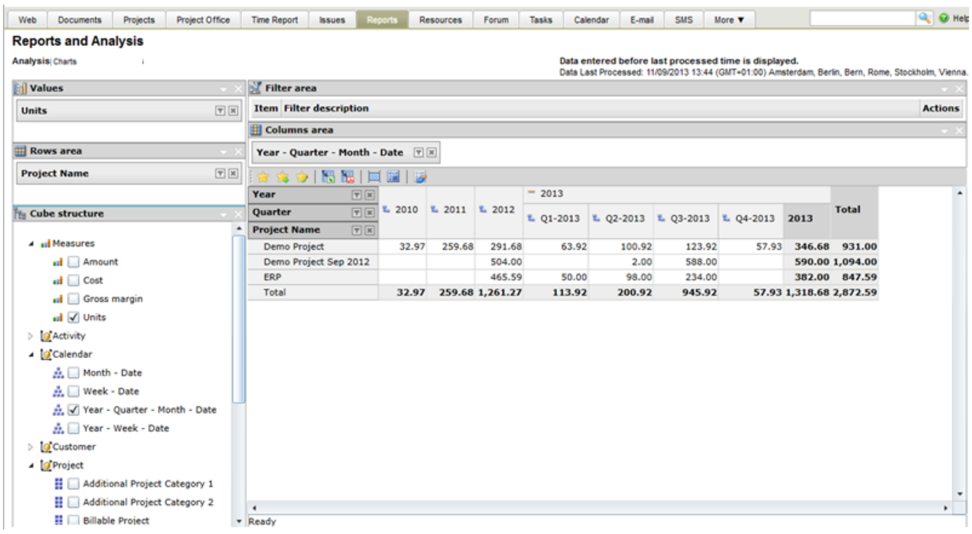

*Chart dialog*

Analysis reports are created in the same way as in the analysis tab.




*Analysis dialog*

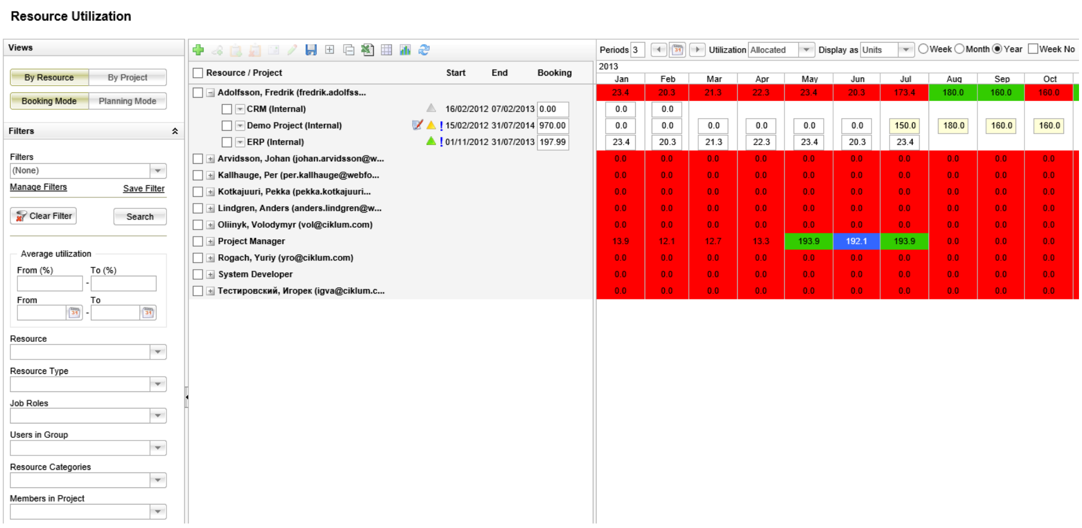
### *Analysis (previous version)*



*Analysis (previous version) tab*

# Resources

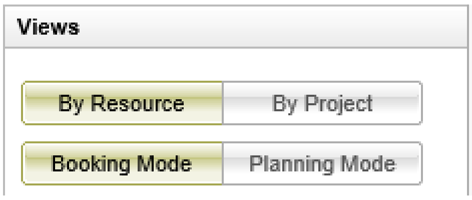
The resource utilization view is used for resource scheduling. Here it is possible to get a cross-project view of who is doing what and when. This view should only be used for the unit of measure, UOM, used in the calendar, i.e. normally hours.



*Resource utilization*

### *Views and Modes*

There are two views – "By Resource" and "By Project". The "By Resource" mode is used to see which projects each resource belongs to. The "By Project" view is used to see which resources belong to which projects.

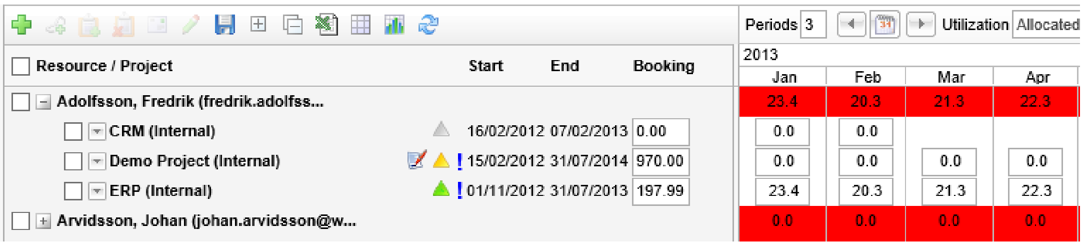



*Views*

In both these views it is possible to look at the information in “Booking mode” and “Planning Mode”. “Booking mode” is used in order to manage how much time a resource should spend on specific projects without specifying exactly which activities that resource should be assigned to. “Planning mode” is used to get a more detailed view of which activities resources have been assigned to. The views are explained in more detail below.

### *General Functionality*

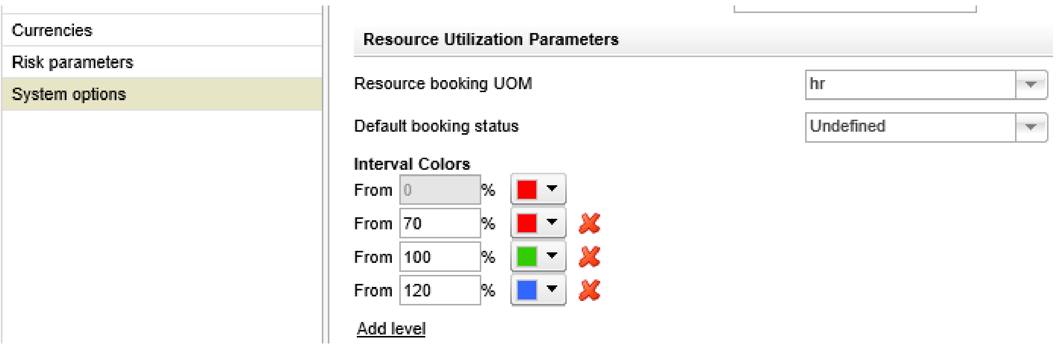
A click on a project in the list will take you directly to the resource allocation view for that project, which means that you can easily make changes to the work plans provided that you have such permissions.




A correct display in this view requires that the resource calendars that can be found in configuration under the admin tab are correctly set up.

In system options, also under the admin tab, settings are made for booking which unit of measure (UOM) to use for resource bookings. This is also where the default booking status is set.

It is possible to define interval colors for bookings. On the screenshot below, bookings from 0% to 99% are red and bookings between 100% and 119% are green.



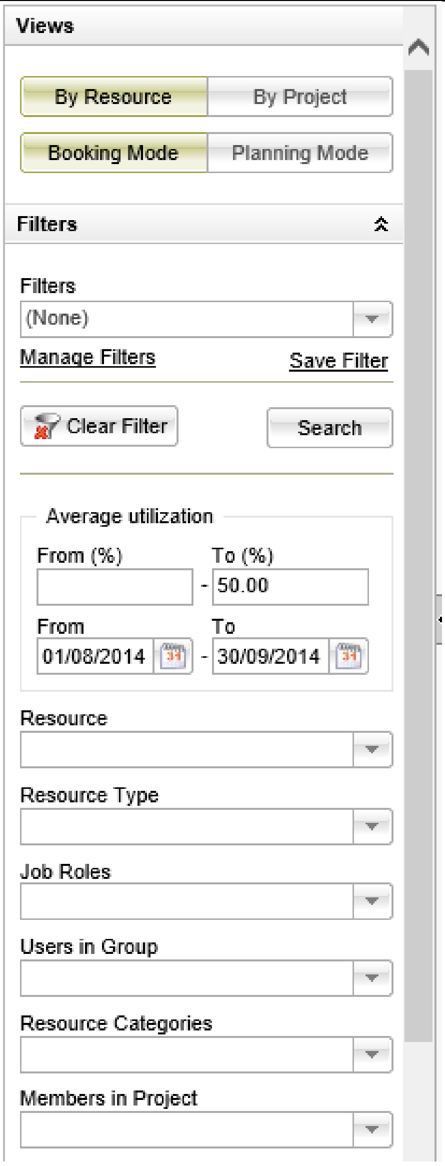
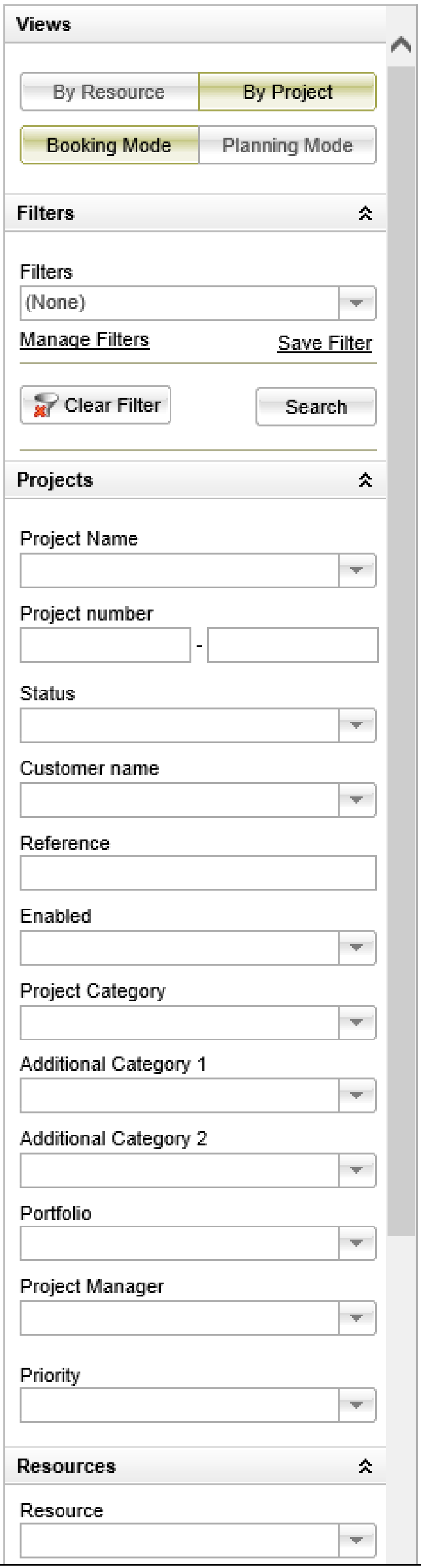

*System Options with Resource Booking Parameters*

### *Filtering*

The left hand filter pane can be used for filtering in a similar way as in other modules. An example could be that Resources have been divided into internal and consultant that in turn have been assigned different job roles. The filter function could then be used to find for instance internal resources that can work as Senior Designers. By default, only the workspace standard UOM set in system options is displayed. If you are working with bookings, only the Booking UOM is available.

In the “By Project” view it is possible to filter on both projects and resources.
In the “By Resource” view it is not possible to filter on projects, but it is possible to search for resources fulfilling specific utilization criteria. In the “By Resource” example below a search has been made for resources with a less than 50% average utilization for the period Aug 1 to Sep 30 2014.

| By Resource | By Project |
|---|---|
|  |  |

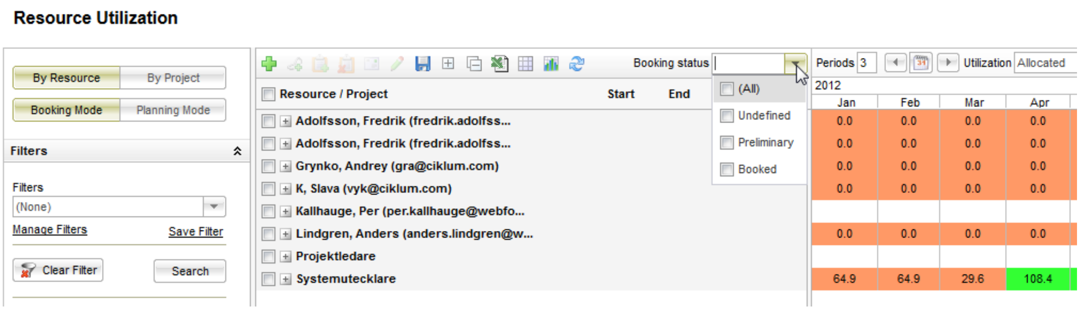




*Filtering*

Filters can be saved by clicking “Save Filter” and saved filters can be changes by clicking “Manage filters”. Saved filters can be either private or public.

It is possible, in booking mode, both by resource and by project, to filter the utilization data based on booking status.




*Filtering on utilization data based on booking status*


*Save filter dialog*

A Public filter will only display such projects that the user has at least read rights on.

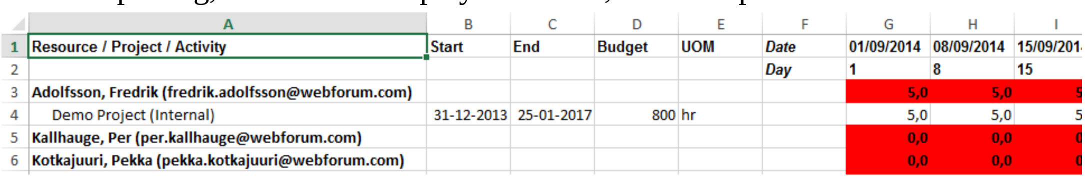
### *Planning mode - icons*

In planning mode, the following toolbar icons are displayed:

| Icon | Function |
|---|---|
| | Expands checked rows |
| | Collapses checked rows |
| | Exports data to excel |
| | Grid mode |
| | Chart mode (see explanation further down) |
| | Refresh screen |

**Export**

When exporting, data will be displayed in cells, see example below:

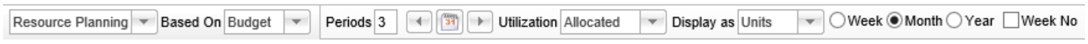


| | A | B | C | D | E | F | G | H | I |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Resource / Project / Activity | Start | End | Budget | UOM | Date | 01/09/2014 | 08/09/2014 | 15/09/201 |
| 2 | | | | | | Day | 1 | 8 | 15 |
| 3 | Adolfsson, Fredrik (fredrik.adolfsson@webforum.com) | | | | | | 5,0 | 5,0 | 5 |
| 4 | Demo Project (Internal) | 31-12-2013 | 25-01-2017 | 800 | hr | | 5,0 | 5,0 | 5 |
| 5 | Kallhauge, Per (per.kallhauge@webforum.com) | | | | | | 0,0 | 0,0 | 0 |
| 6 | Kotkajuuri, Pekka (pekka.kotkajuuri@webforum.com) | | | | | | 0,0 | 0,0 | 0 |

*Exported utlization data*

### *Planning mode – more menu choices*

It is possible to make various types of selections using the functions and filters in the toolbar. You can choose to display Budget or ETC, # of periods, if you want to see allocated time or time not yet allocated, if it should show units, full time employees (FTE) or percentage and if weeks, months or years should be displayed.




*The resource utilization toolbar with Resource planning selected.*

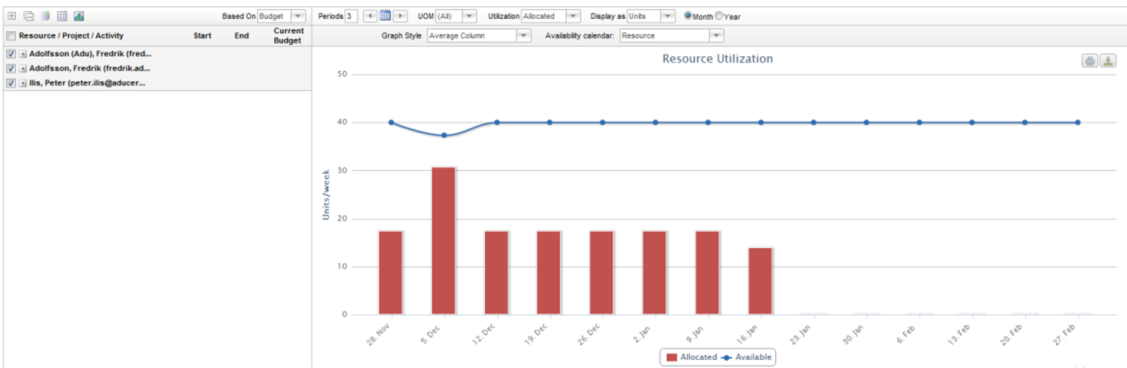
**Utilization**
It is possible to show allocated time, i.e. the time a person will work, unallocated time, i.e. time the resource is not allocated to any project, and total, i.e. the total time a resource would have had available if it had not been allocated to any project. This is useful in order to quickly see if there are resources working part time.

**Display as**
The resource utilization view will show if a person is over allocated based on the resource calendar. When the allocation is shown in percent, resource-specific calendar exceptions will be considered, i.e. if a person is working part time 20 hours a week, a 20 hour allocation of time will be displayed as 100% allocated.

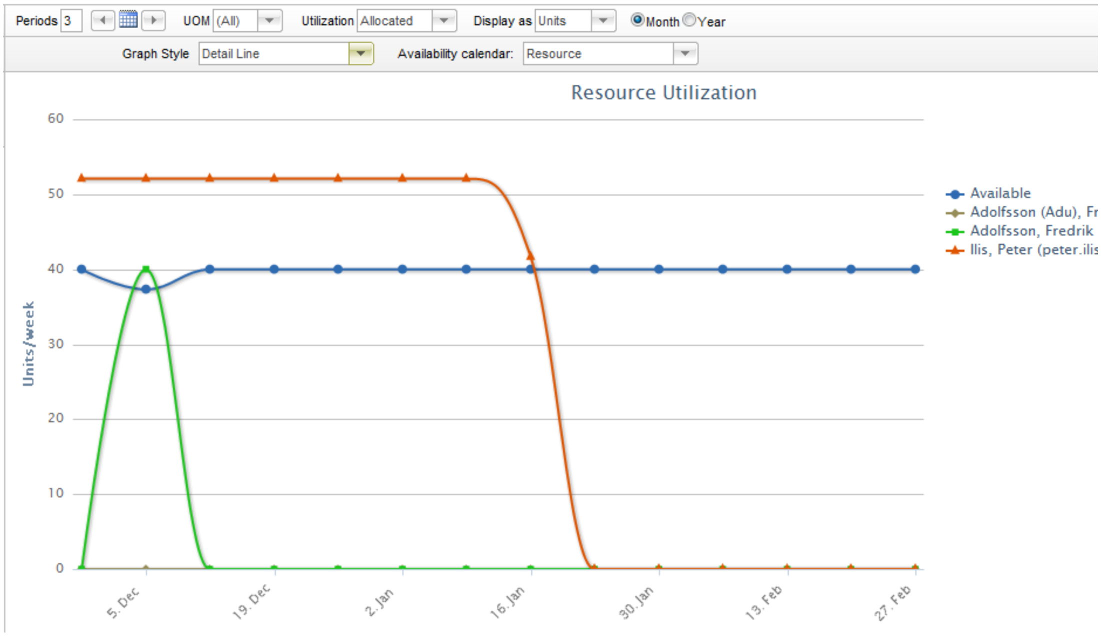
When the display mode is FTE, resource-specific exceptions will not be considered. If the normal work week is 40, 20 hours will be displayed as 0.5 FTE. If the normal work week is 40 hours, but there is a general 8-hour exception that week due to, for instance, a bank holiday, 20 hours will be displayed as 20/32 = 0,62 FTE.

**Chart view**
It is possible to choose between grid and graph by clicking on the corresponding symbol  in the toolbar.

There are three main charts, one for average allocation, one for total allocation and one for a detailed allocation displaying each selected resource separately. All choices, such as monthly or yearly view, are available also in graph mode.




*Average allocation*




*Detailed allocation*

The available line displays the available time considering either resource calendar exceptions or just the standard calendar including general exceptions. If the columns or individual lines are higher than the available line, it indicates that the resources are over allocated. Graphs can be printed and exported as pictures that can be used in other programs. A maximum of 5 resources will be displayed at the same time.

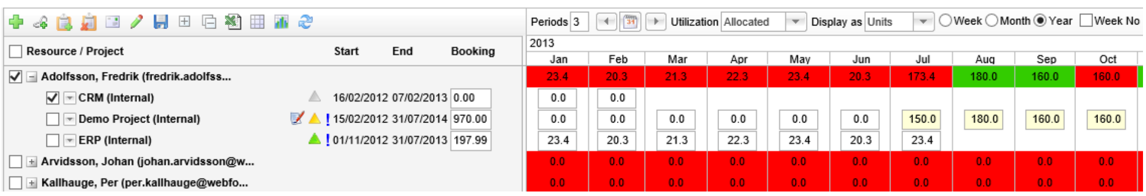
## *Booking*

In many cases, activity assignments are done at a later stage in a project whereas the resources are booked, i.e. assigned to a project, even before the project has started. The booking function handles this.

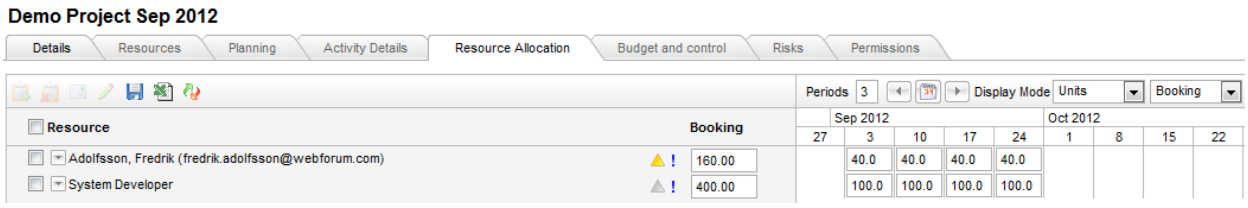
The function makes it possible to book resources to projects without assigning them to activities. Bookings can be made evenly from the project start date to the end date, or manually with different values for different time periods.

It is possible to work with bookings for all projects and resources at the same time in Resource Utilization, or with bookings for a specific project on the Resource Allocation tab for that project.

Please note that in Resource Utilization, only projects with project dates within the displayed time interval will be displayed.




*Resource booking in Resource Utilization*




*Resource booking in Resource Allocation*

This text will mainly cover how to work with bookings in the Resource Utilization view, since it has more functionality.

Bookings can be displayed as Units, Percent and FTE (Full Time Equivalents) and are set by Project. The numbers for the projects are then summed up to the Resource level. The booking cells on the project level are updateable. Manually updated cells are marked with a light yellow color and this symbol . Clicking on the symbol will take away the manually entered information and spread the booking evenly over the duration of the project.

The exclamation mark ! indicates that a resource has activity assignments in that specific project.

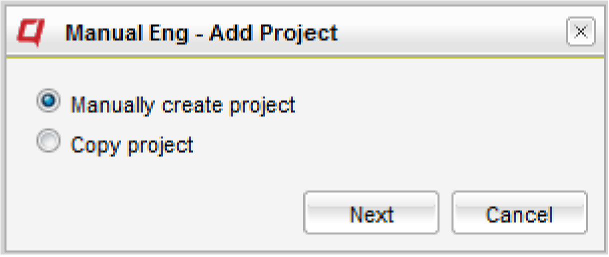
The triangle shows the booking status. Grey is undefined, yellow is preliminary and green is booked. Click on the status symbol to change status.

The toolbar contains a number of icons related to bookings in addition to the icons explained above under planning.

| Icon | Function |
|---|---|
| | Adds a new project |
| | Connects projects to resources |
| | Paste ETC from the project plan |
| | Remove booking |
| | Send e-mail with booking information |
| | Edit booking details |
| | Save booking information |

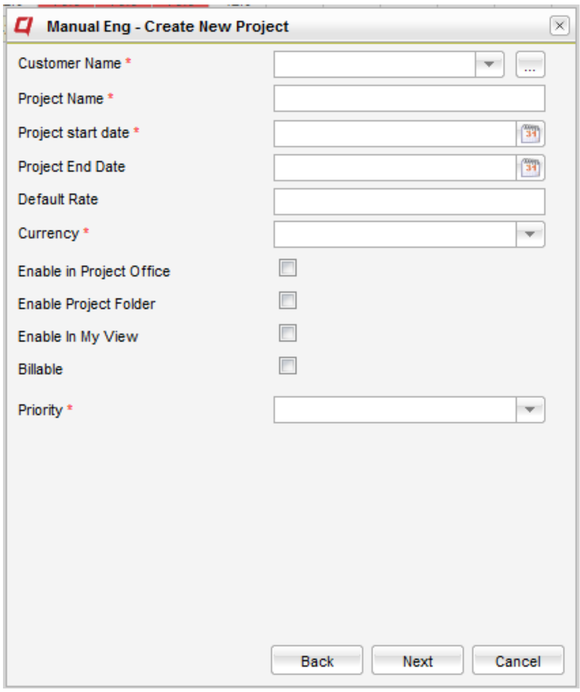
### *Add New Project*

This function creates a new project manually or based upon an existing project.



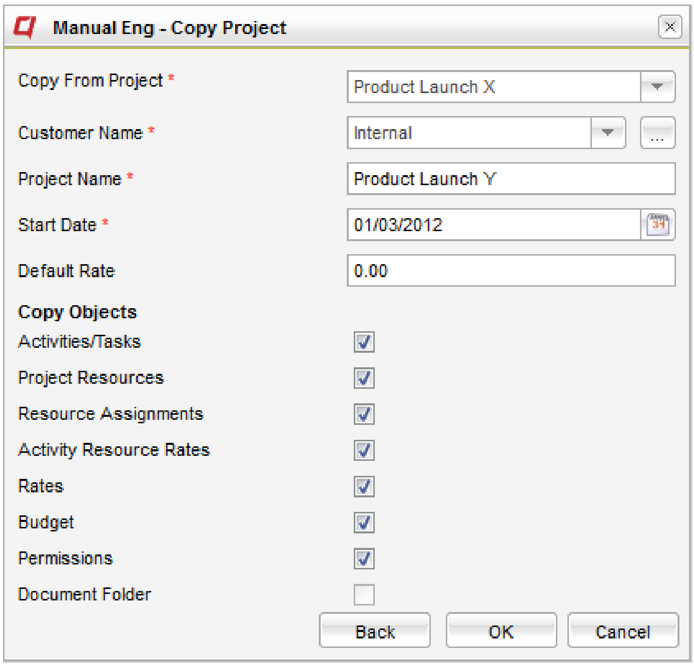

*Add Project*

When the project is created manually, the creator will be asked to fill in the most important fields including all mandatory fields.



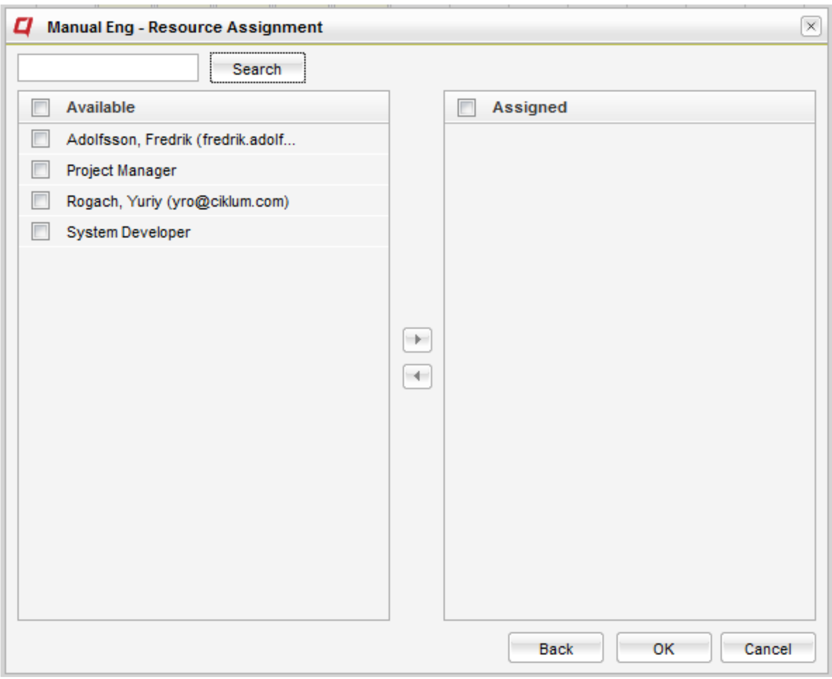

*Create New Project Manually*

When a project is copied, the same dialog as in the normal copy project function will be displayed.



*Create New Project Based on an Existing Project*

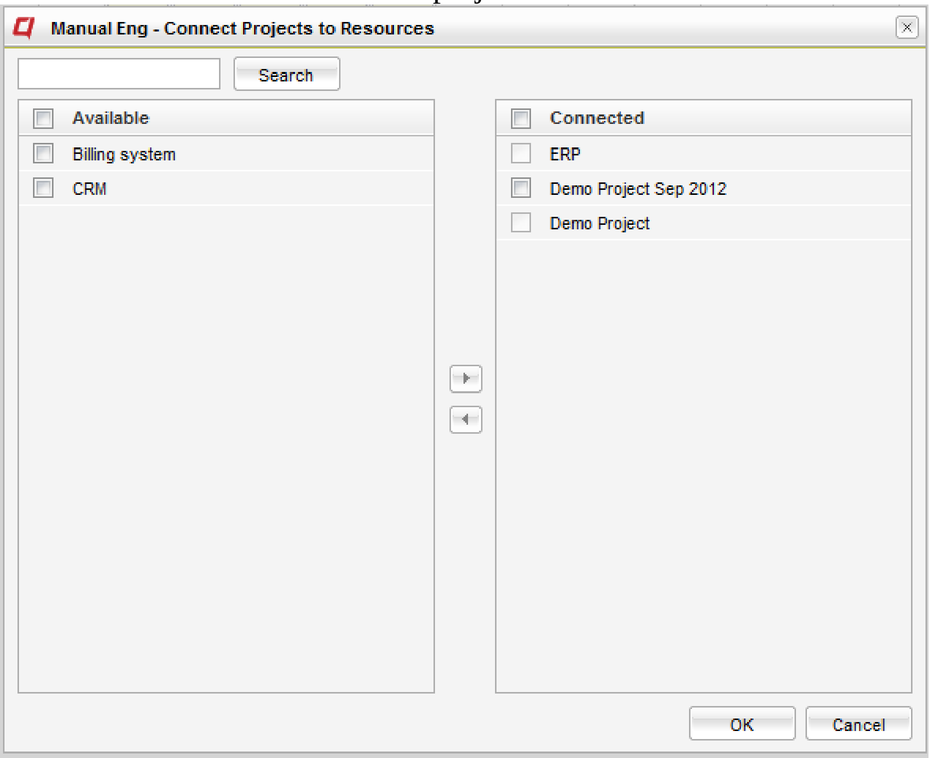
In both cases, the creator will be asked to assign resources to the project as a part of the creation process. If the project is based upon copy and copy project resources has been chosen, the currently assigned resources to the copied project will be displayed as assigned, but it is possible to assign more resources as well.



*Resource assignment*

### *Connect Projects to Resources*

The connect projects to resources function will connect the currently marked resources in the list to the chosen projects.




*Connect Projects to Resources*

### *Paste ETC from the project plan*

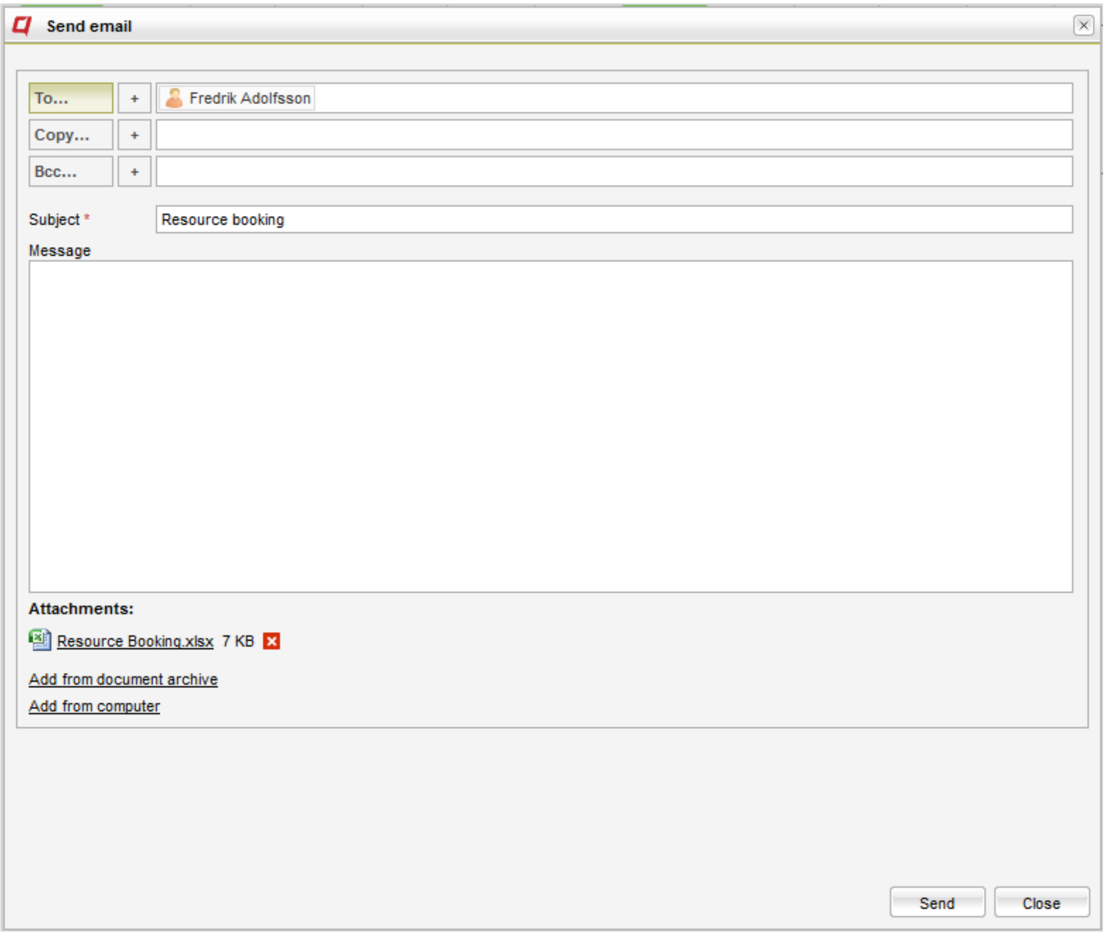
This function takes the ETC and copies it into the booking. This is useful especially when activity planning has been made before booking has been made.

### *Remove booking*

This removes all booking data for the marked resources and projects

### *Send e-mail with booking information/booking requests*

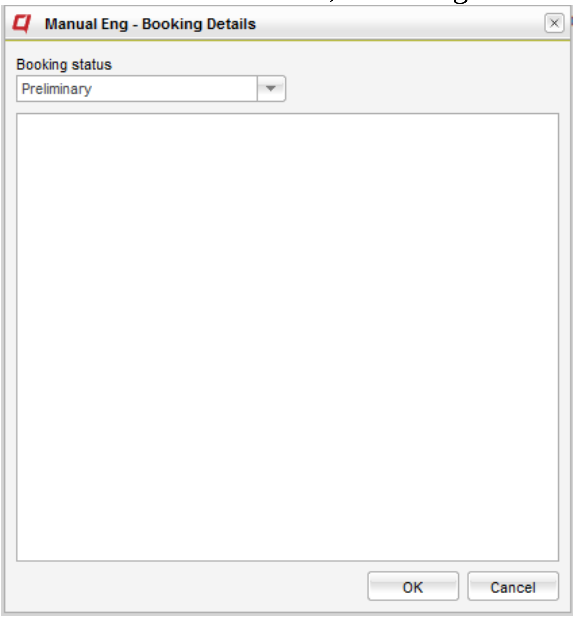
This function sends an e-mail with booking data for the selected resources attached in an excel file. One purpose of this is in order to make a booking request. The person receiving the request can see the booking status per time period until the end of the projects in the excel file.




*E-mail from resource booking*

### Edit booking details

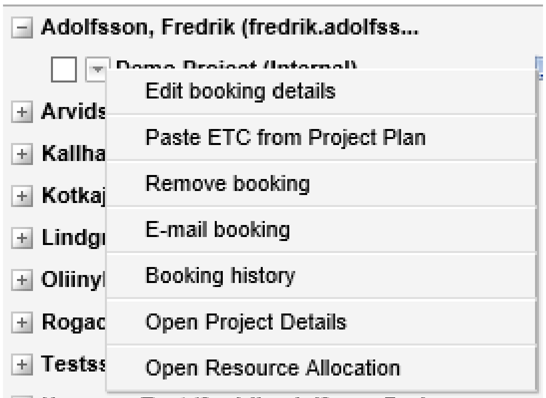
This function is used to change booking status and to write a booking comment. If the toolbar icon is chosen, the changes will affect all the marked resources.



*Edit booking details*

### Context menu

There is a project context menu that contains the following fields:

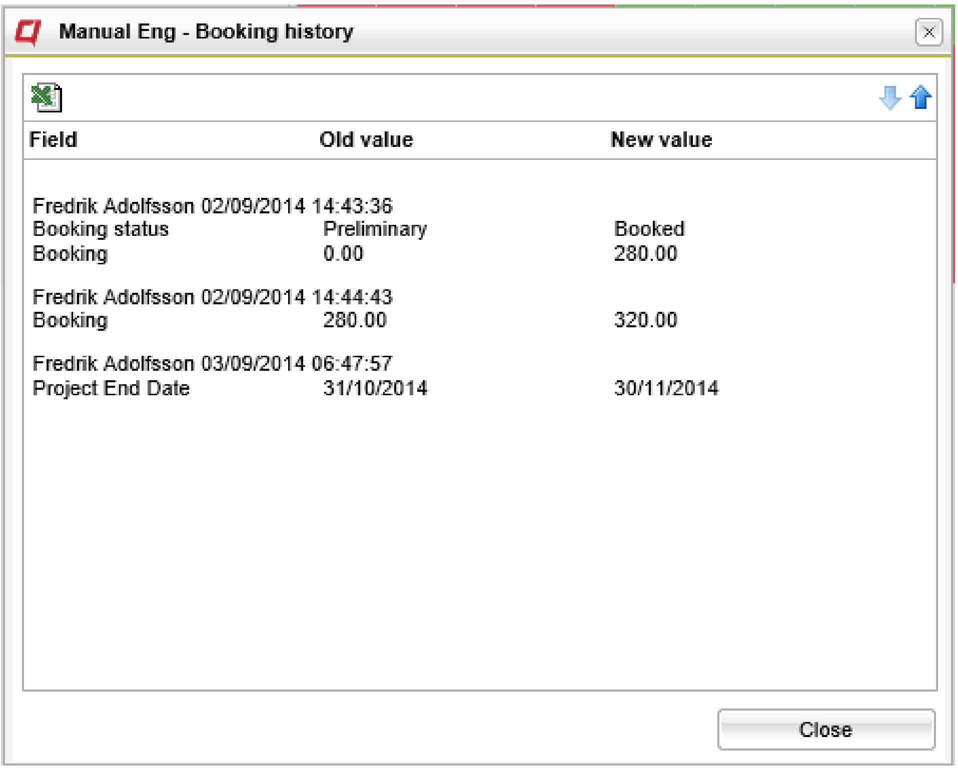


*Booking – Project Context menu*

**Edit booking details** – See information above
**Paste ETC from Project Plan** – See information above
**Remove booking** - See information above
**E-mail booking** - See information above
**Booking history** - See information below
**Open Project Details** – Opens the Project Details tab for a project. This is useful for changing start and end dates, for instance. It is possible to navigate back to resource utilization when ready.
**Open Resource Allocation** – Opens the Resource Allocation tab for a project.

### *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.




*Booking history - Details*

### *Resource Booking Process Example*

There are many different ways to work with resource bookings depending on the type of organization one has. These are two examples in order to illustrate possible work processes. Please see the Project Management manual for a description of how to perform the various steps described here.

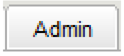
**Process 1: the required person is *known* to the person creating the project plan**

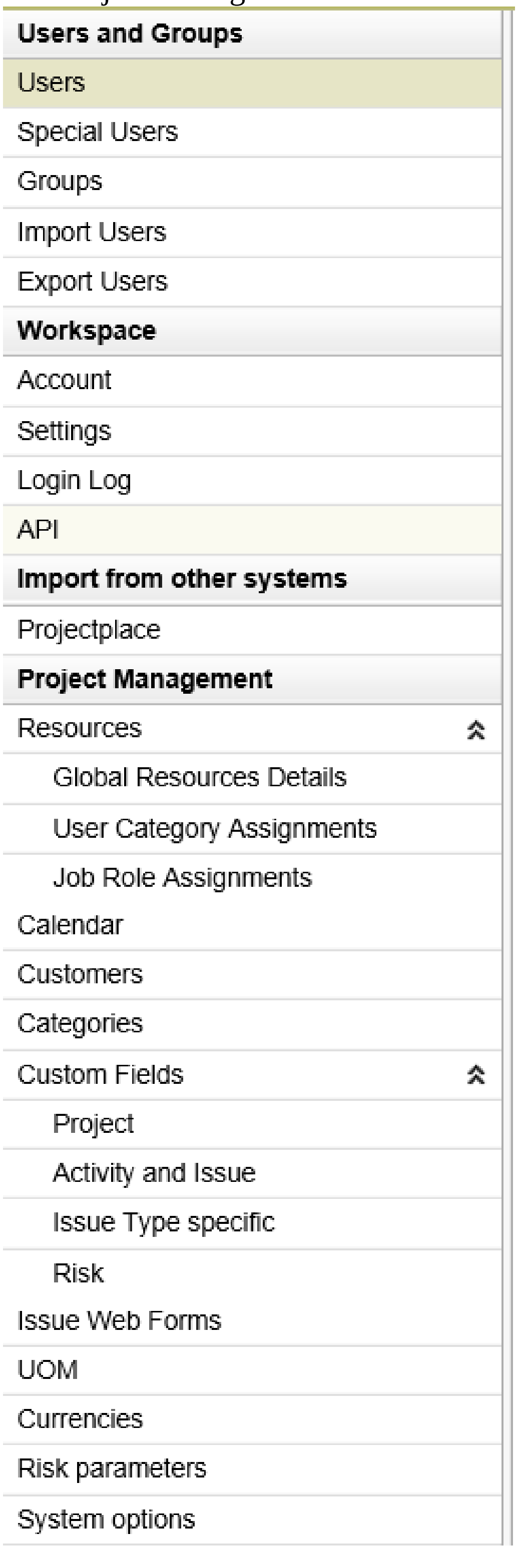
1. Resource “X” is added to the project and given a preliminary booking status
2. A preliminary project plan is created and Resource X is assigned to various activities and given a budget.
    a. The budget is automatically also copied into ETC.
    b. The Resource Allocation view for a project displays the total time that Resource X will have to spend on the project.
3. The ETC figure is copied into the booking for Resource X.
4. The booking information is communicated to the person responsible for all resources, for instance by e-mail.
5. The responsible person makes sure that Resource X is not assigned to other projects during this time and changes the booking status to booked, possibly with a booking comment.
6. The resource responsible informs about the new booking status.

**Process 2: the required person is *unknown* to the person creating the project plan**

1. A fictive project or global resource called Project Manager is added to the system
2. The Project Manager is added to the project and given a preliminary booking status
3. A preliminary project plan is created and the Project Manager is assigned to various activities and given a budget.
    a. The budget is automatically also copied into ETC.
    b. The Resource Allocation view for a project displays the total time that the Project Manager will have to spend on the project.
4. The ETC figure is copied into the booking for the Project Manager.
5. The booking information is sent to the person responsible for all resources, for instance by e-mail.
6. The responsible person looks at the request and searches for real people that have the right qualifications and that are available during the requested time period.
7. When a person is found, that person is assigned to the project and given a booking similar to the one for the fictive resource and an approved status.
8. The resource responsible informs about the allocated resource.
9. The person who created the preliminary plan uses the replace resources function to move activity budgets from the fictive Project Manager to the real one.
10. The booking for the fictive Project Manager is deleted.

# Admin

The admin tab   is where the system is administrated and, to a large extent, configured. The sections important for Project Management are Users, Groups, API and Project Management.

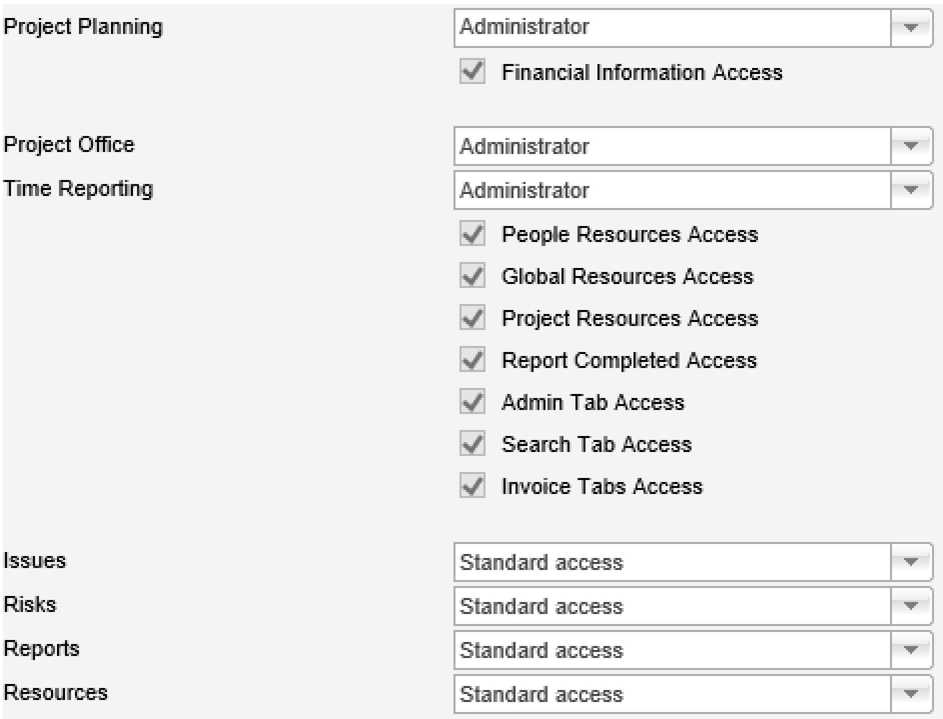


*Administration menu*

### *Groups*

On a group level, it is possible to set permissions to the Planning, Time reporting, Project office, Issues, Reports and Resources modules.

Standard access means that specific rights depend on the permission settings for the specific user on a specific object, such as a project. The create project permission means that a person will see the “New” button in the project listing in addition to the other access rights set on the user level. Administrator access overrules object permissions. Administrator permission for Project planning gives administrative rights for Issues and Risks as well.




*Group permissions*

In the **Project Planning**, also called Projects, module, a group can have no access, standard access, create project and administration permissions.

The “Financial Information Access” checkbox decide whether the users with this responsibility are allowed to see information about prices and costs for the projects they have access to.

In **Project Office**, a group can have standard or no access.

In **Time Reporting**, a user can have standard access, administrator and no access.

The “Time report access” check boxes (People, Global, Project, Report, Admin) decide if group members are allowed to see and work with all time reports or just the time report belonging to certain users/resources.

Even if the checkboxes are checked, the resource will only be able to see and update time that users/resources have worked on projects which the user has at least update rights to. It is not enough to have read rights to a project. Regardless of these settings, a user can always access his/her personal time report.

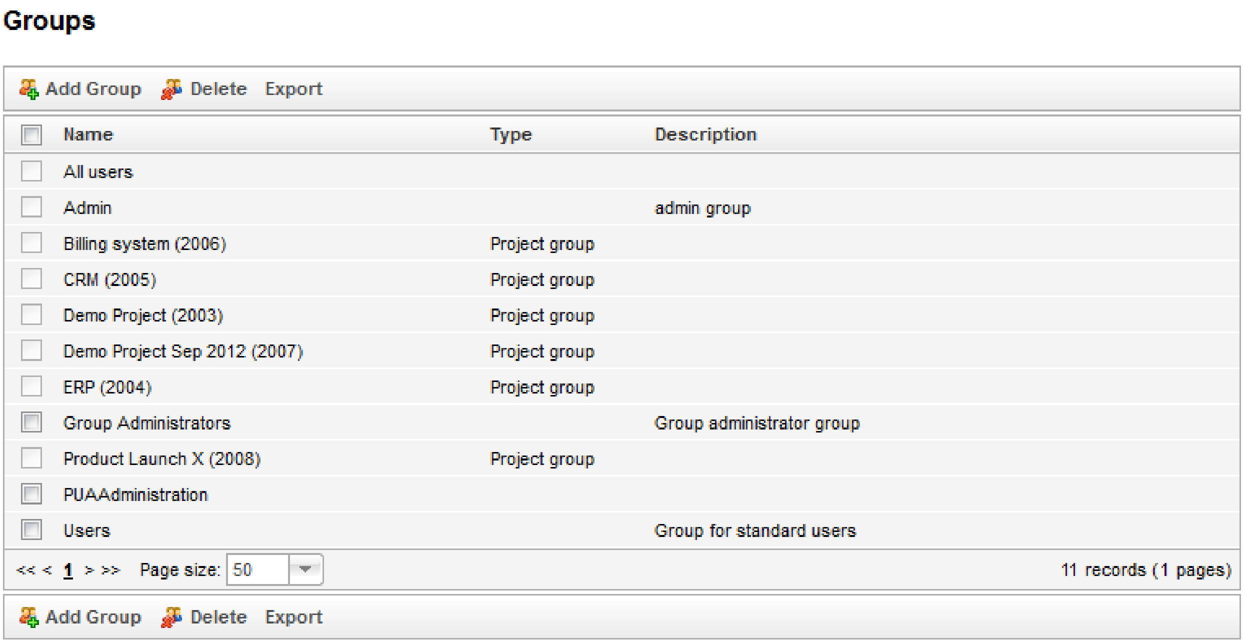
The “Report completed access” check box decides if the responsibility is allowed to update days already flagged as “Report completed”.

The Time report search access gives access to the time report search tab. Invoice tab access gives access to both “Create Invoices” and “Invoices” tabs.

In **Issues**, a group can have no access or standard access
In **Risks**, a group can have no access or standard access
In **Reports**, a group can have no access and standard access
In **Resources**, a group can have no access and standard access

The “Enabled” check box decides if the responsibility will pop up in default lists and when setting up users.

A Project Group is created when a project is created, (see the Webforum Project manual for more information about adding projects).



**Groups**

Add Group Delete Export

| Name | Type | Description |
|---|---|---|
| All users | | |
| Admin | | admin group |
| Billing system (2006) | Project group | |
| CRM (2005) | Project group | |
| Demo Project (2003) | Project group | |
| Demo Project Sep 2012 (2007) | Project group | |
| ERP (2004) | Project group | |
| Group Administrators | | Group administrator group |
| Product Launch X (2008) | Project group | |
| PUAAdministration | | |
| Users | | Group for standard users |

<< < 1 > >> Page size: 50 11 records (1 pages)

Add Group Delete Export

*Groups, including Project Groups*

The group will show up among all other groups, but it will be marked with the project number and with Type: “Project Group” in order to differentiate it from other groups. The Project group will contain all users added to a project. Project groups cannot be removed unless the project itself is removed.

Users can be added to Project groups both from the Admin tab and from the resource tab within a project. This means that a person with update on a project can add members to the project without admin rights.

By default, only project members and admin can see the project group and its members in lists. Under advanced settings for the project group it is possible to give more users and groups permission to see it. Add the user/group to the list and give them “Read” permission.


*Groups – Advanced Settings*

### *Users*

In the user administration, all categories set up in Project Management will show up on a user in the Project Management Parameters section. Please read more under responsibilities and categories.


*User level parameters for PM.*

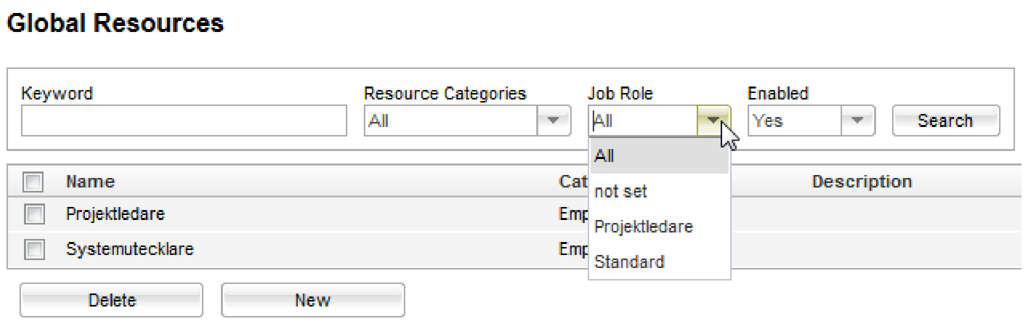
**Approver For** contains a list of groups a user is an approver for. Being an approver means that the user can mark time reports as approved. In the system options, it is also possible to give approver the right to update time reports for the persons in the group(s) the user is an approver for. As an administrator, you can add or delete groups in this list.

Please also see the Webforum Teamwork manual for more details about user and group administration.

## *Resources*

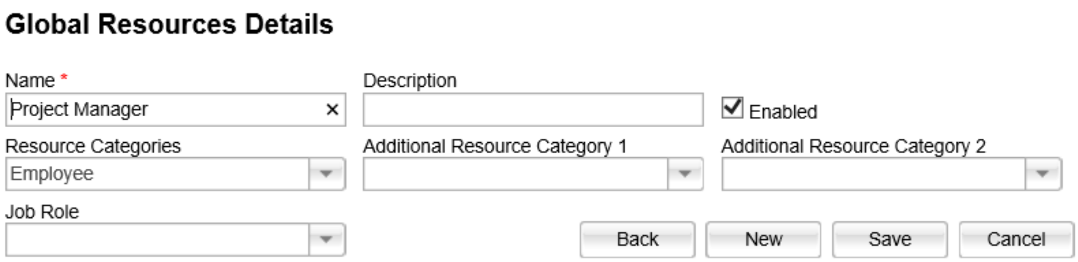
### *Global Resources*

A global resource is often used for planning purposes when it is not yet known who will perform certain activities. A typical global resource could be a Quality Controller or similar, but it could also be a truck or similar. Global resources are available for all projects. Add new resources by clicking “New” and edit a resource by clicking on the resource name.




*Resources*

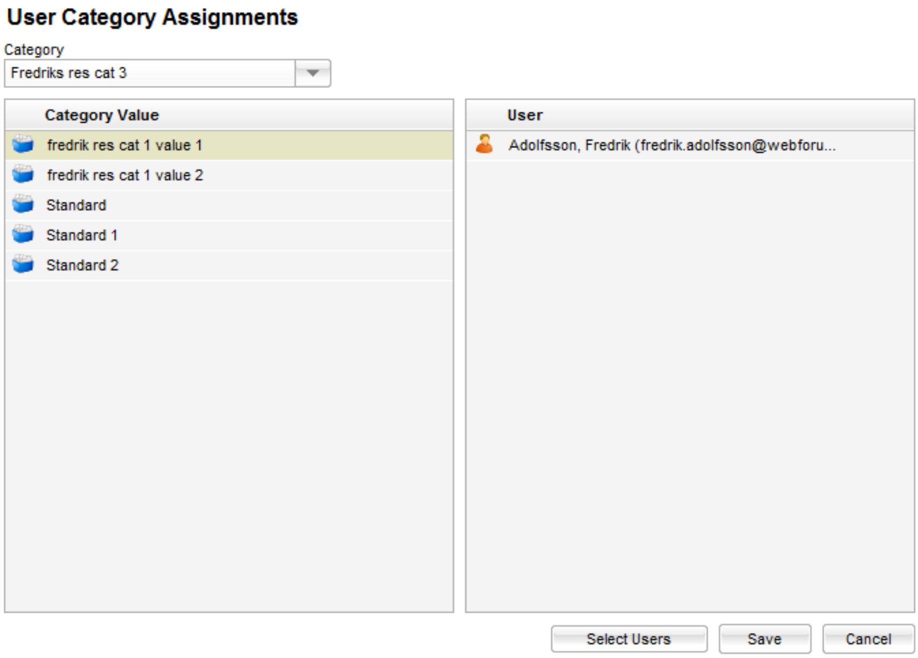
A global resource can have user categories as well as a job role. This makes it easier to search for both global resources and users in the Resources tab.




*Global Resources Details*

### User Category Assignments

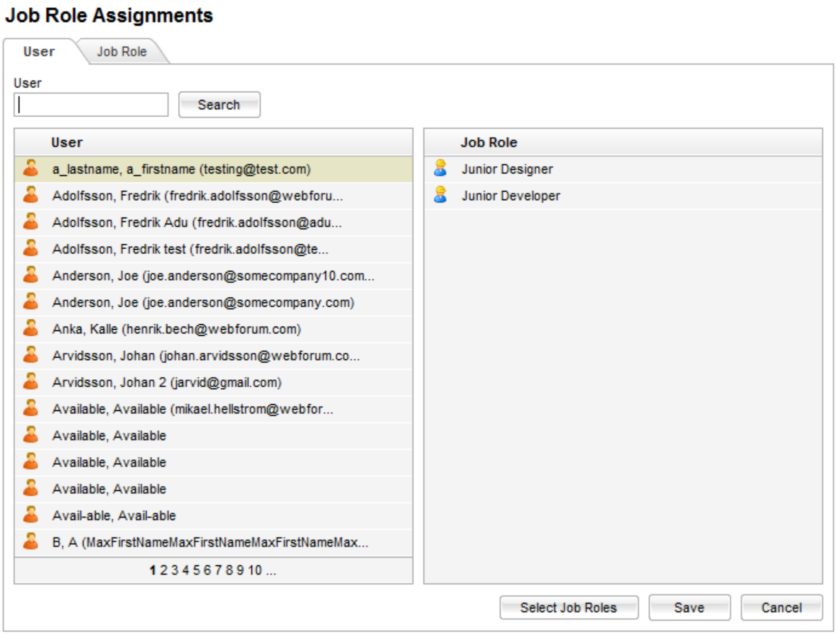
Here it is possible to assign users to custom-defined user categories. The categories can be used in both in the resource utilization view and in the Report & Analysis part of the system to make selections. The categories assigned here are the same as the ones assigned when adding a user to the system, but this view gives a quicker overview and does not require access to the user admin part of the system. If a user is added to a category value, the user will automatically be unassigned from a previous category value within the same category. The user is required to have at least one category assignment for the “Resource category” category.




*User Category assignments*

## Job Roles

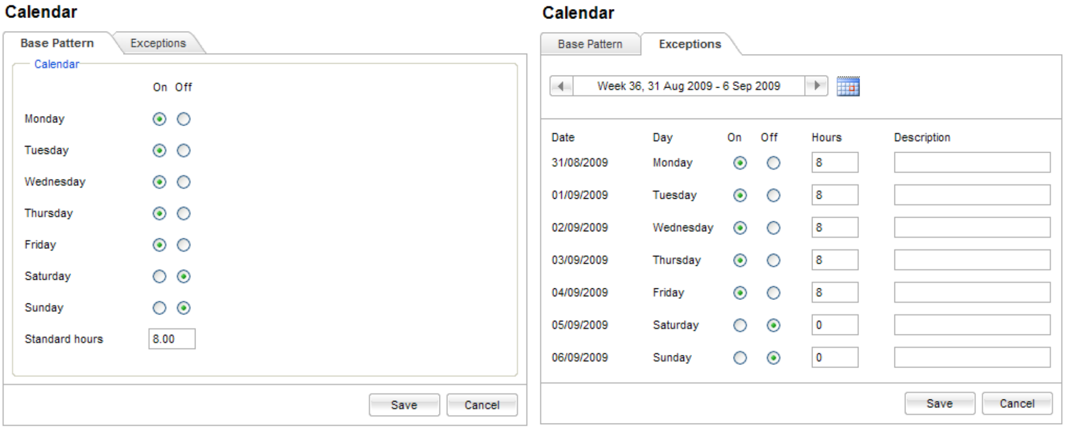
A user can be assigned to one or many job roles, i.e. a user can be both a programmer and a project manager at the same time. Job roles can be used in the Resource Utilization in order to find available resources that can work with a certain type of tasks. Depending on the tab, it is possible to assign either Job Roles to a certain User, or Users to a certain Job Role.




*Job Role Assignments*

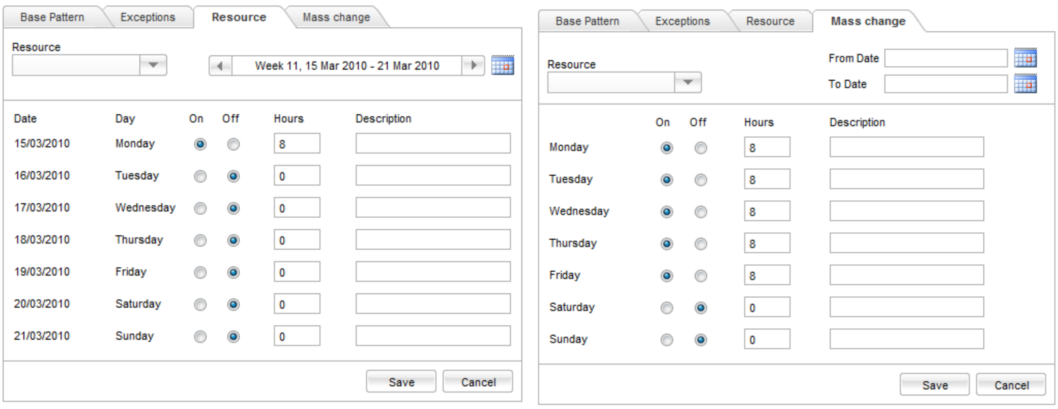
## *Calendar*

The work calendar is a way to control both the standard work week and on/off days. This is used both for resource allocation and for the time report tab.




*Calendar*

It is also possible to set exceptions from the normal work week, for instance that a certain date is a holiday or that another date is only 4 hours long. This affects the resource allocation and is explained in more detail there. It is also possible to set individual calendars for users in the resource tab or using the mass change tab. The mass change tab is good to use if, for instance, a persons is never working on Wednesdays.

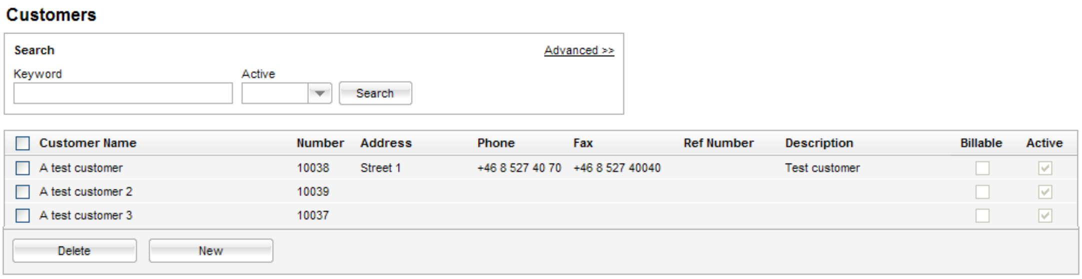



*Resource calendar and Mass change*

Resource level changes are either made for one week at a time or for a longer time period using the Mass change function. The mass change function can only be used for one resource at a time.

## *Customers*

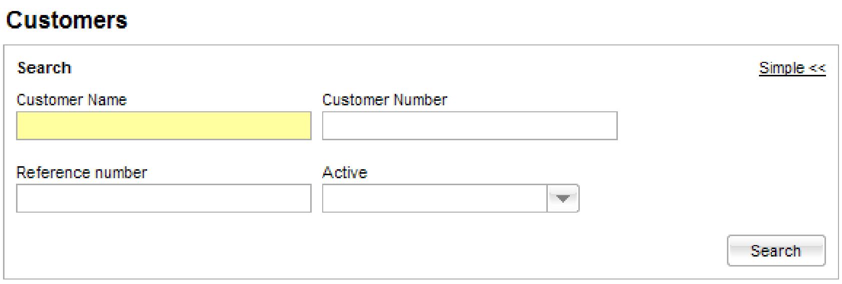
Here you find a list of all customers in the system.



*Customers*

You can choose to add a new customer by clicking the “New” button, change customer data by clicking on the customer name in the list, or delete customers by selecting customers in the list and then click “Delete”.

By pressing the “advanced” button, it is possible to use more details when searching for customers. By clicking “simple”, you will return to the simple search function.



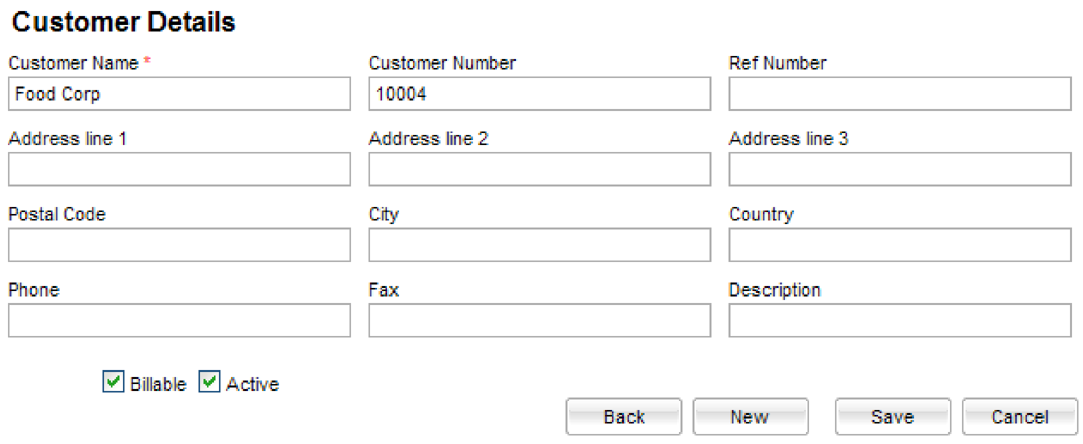
*Search customers*

## Customer Details

This is where you add or change customer details.
The “Billable” flag shows if the customer can be invoiced or not, it is set to no by default.

The “Enabled” flag indicates if the customer is active or not. It is set to yes by default. If a customer is disabled, it is not possible to add projects to the customer and it will not show up in the default customer listing.

Customer number is an internal number given by the system to facilitate identification.



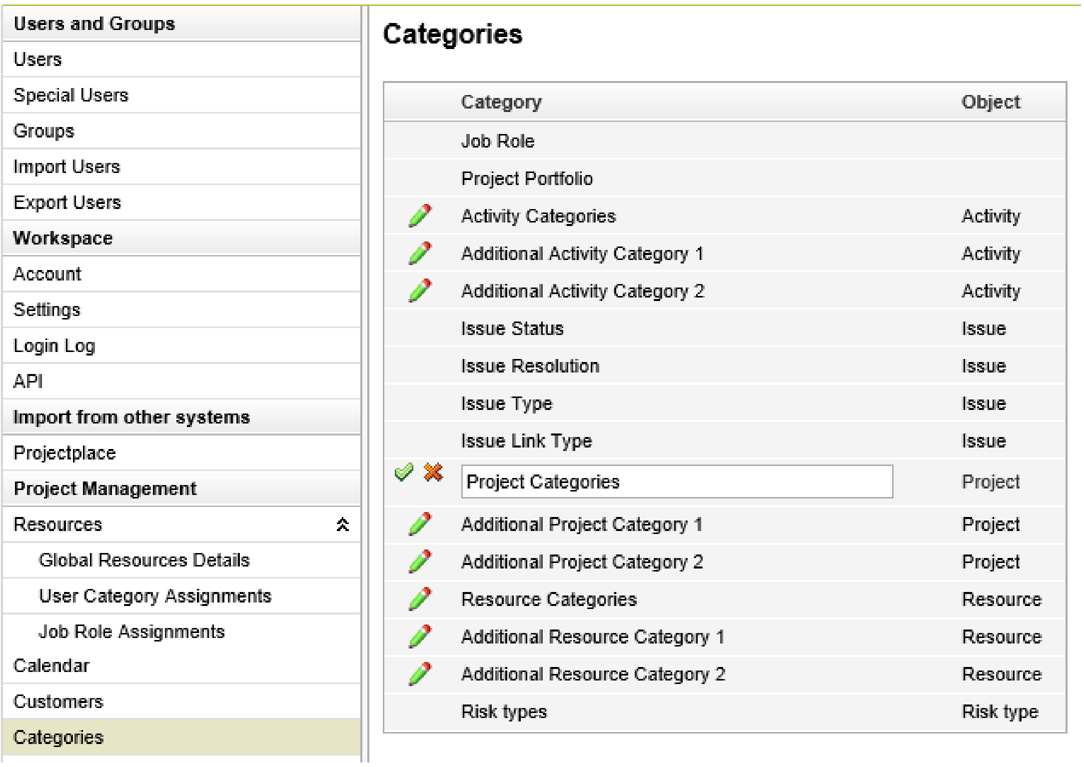

*Customer Details*

### *Categories*

Categories are used together with custom fields in order to classify objects. As opposed to custom fields, categories for child workspaces can be shown in the Project Office and in Reports on parent workspaces. Read more about that under Project Office.

There are six types of categories in the system:

1. Job Role
2. Portfolio
3. Issues
4. Activities
5. Projects
6. Resources
7. Risk type

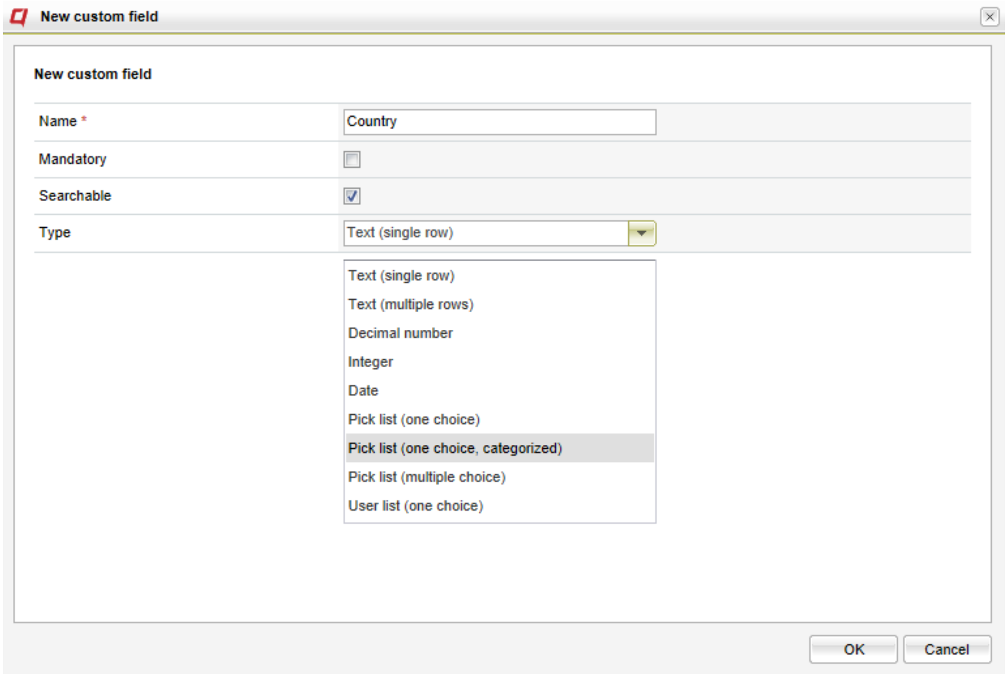



*Categories*

Click on the pencil next to the two user-defined categories in order to update the category names. Click on a category name to open the Category Details window:

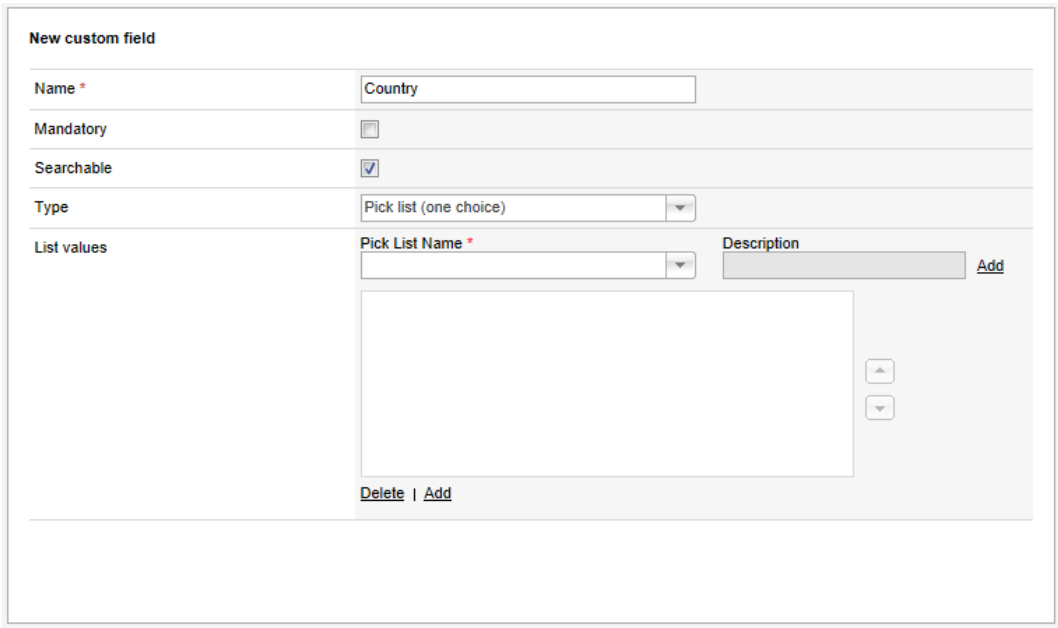

*Category Details*

When you click on "New" you will be able to add an additional custom field. You have a number of field types to choose from. Once you have choosen a type, it cannot be changed to another type.



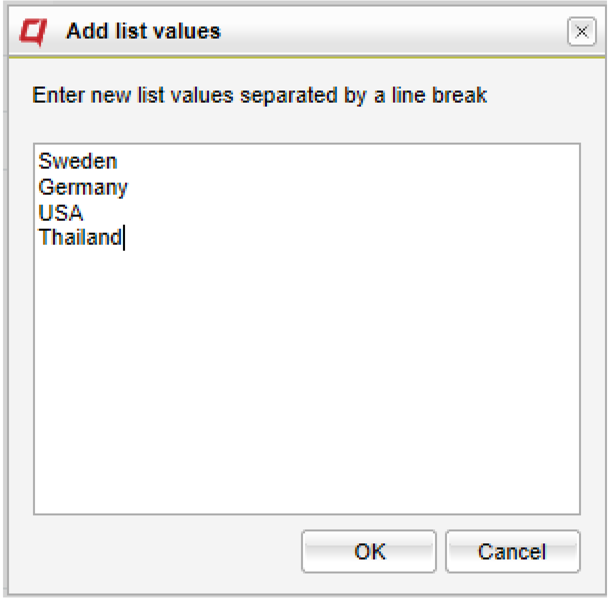

*New Custom Field*

If you choose a list, there will be additional settings in order to add list values to the system. You will first either choose an existing list or add a new list to the system by pressing “Add” next to the description field.

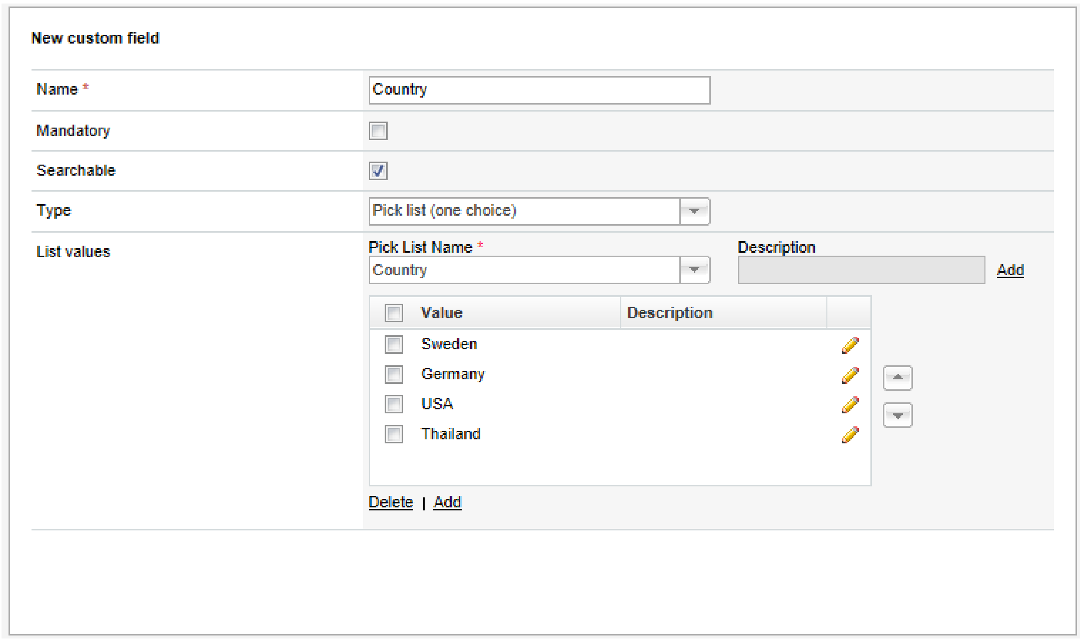



*Pick lists*

After adding a list name, you will have to add list values. That is done by clicking “Add” below the empty box.

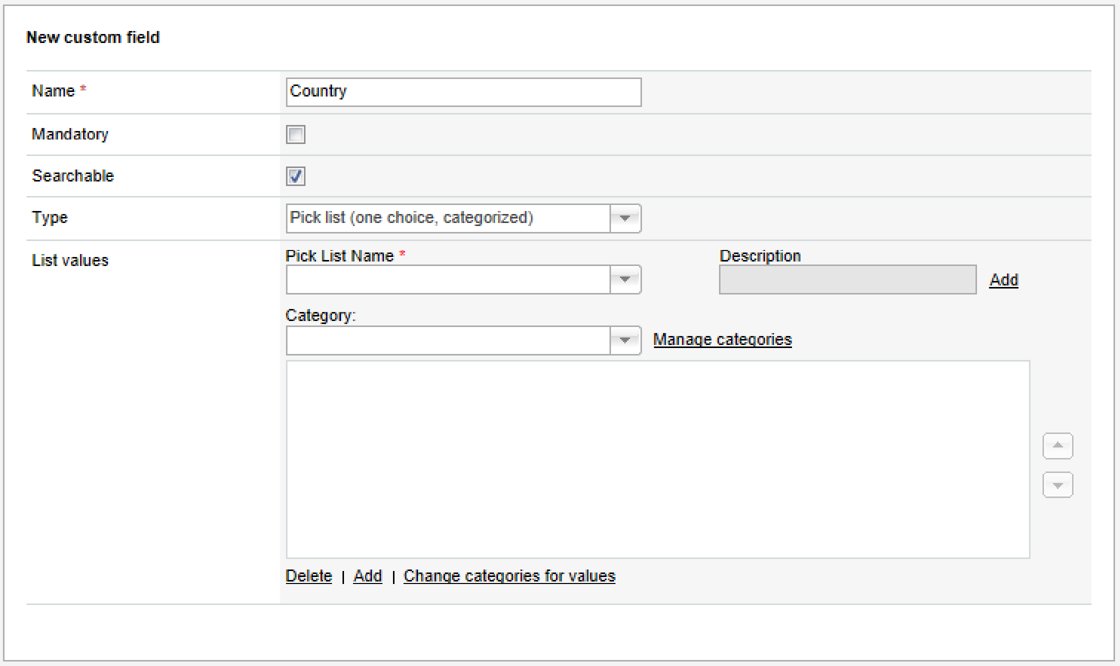


*Add list values*



*List values*

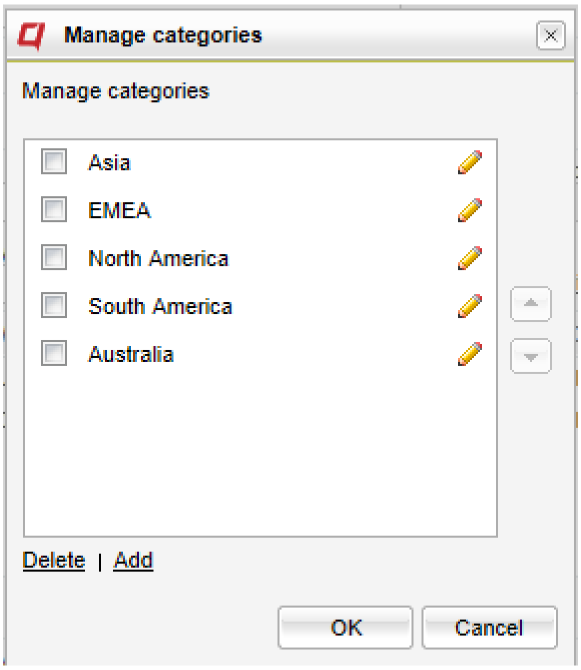
In some cases with a lot of values, it can be wise to categorize the values. That is done by choosing the "Pick list (one choice, categorized) type.



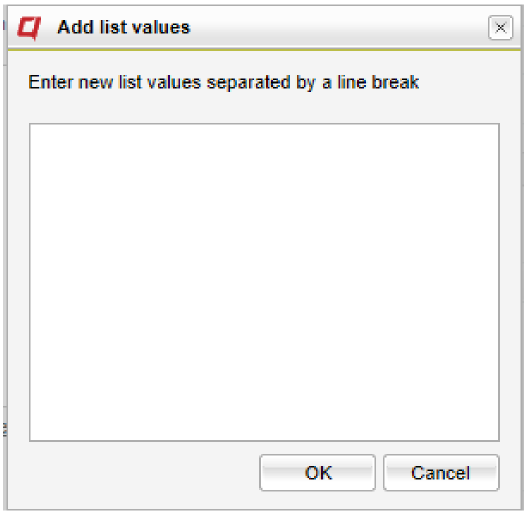

*Categorized pick list*

A typical example would be to categorize countries in groups such as EMEA, Asia, North-America etc.

Click on "Manage categories" and then on "Add" to add categories.

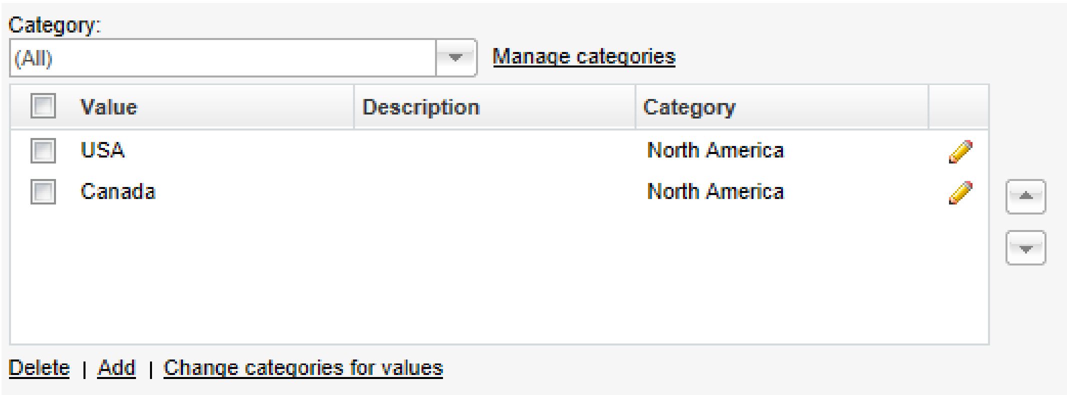



*Manage Categories*

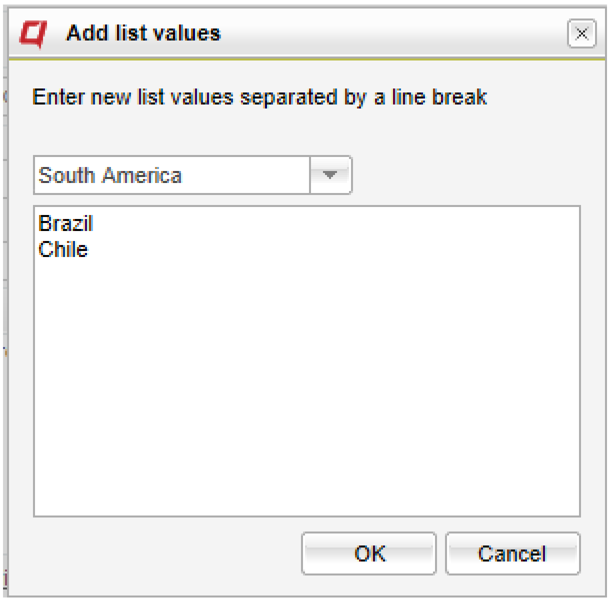



*Add list values for categories*

Once you have added categories, you can press OK to go back to the list type window and choose “Add” to add values.




*Categorized list values*

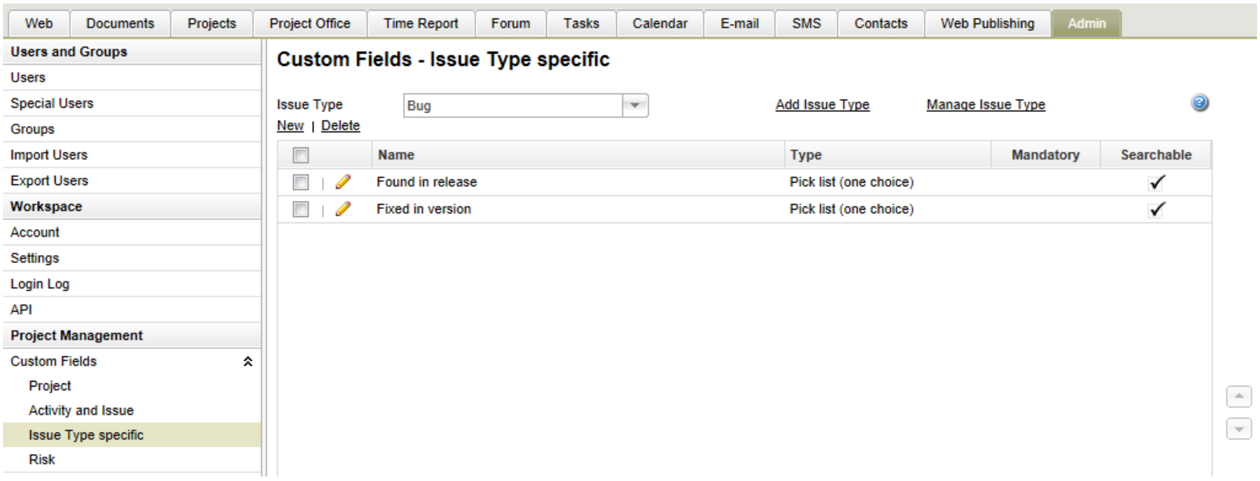



*Add values*

Once values have been added in the various categories you can press OK to save. If you later on want to change categories for certain values. Press “Change categories for values”.

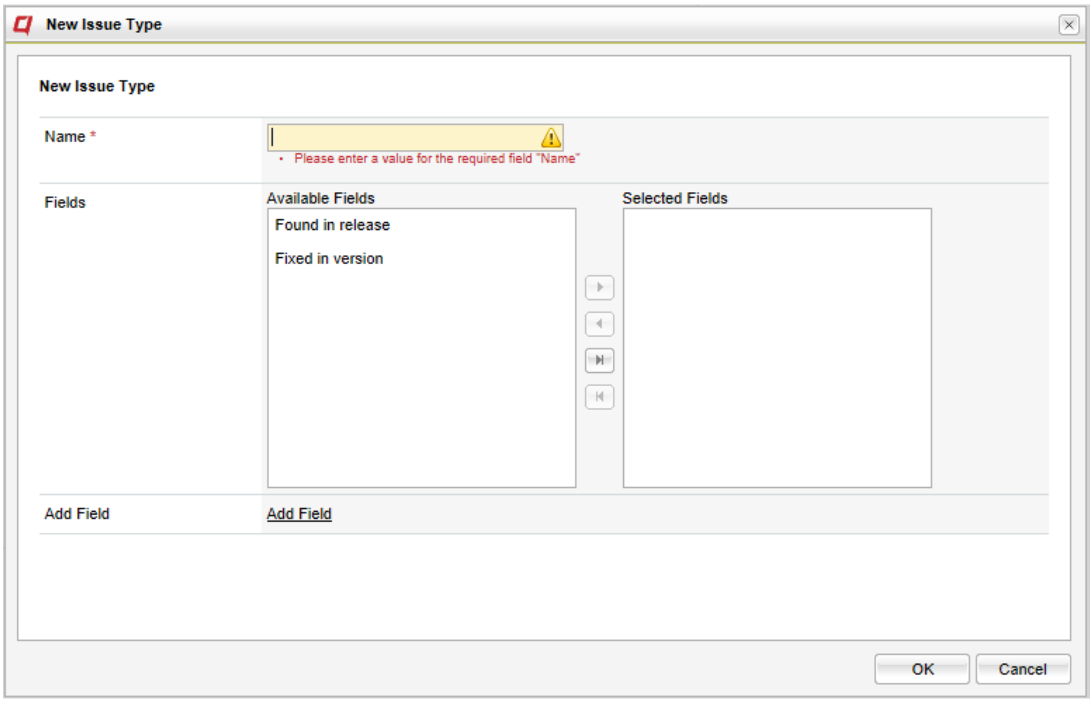
## Custom Fields – Issue specific

In addition, it is possible to add issue-type specific fields using the Issue-Type Specific Custom Fields found in Admin. Press Click “New field” in order to add a new field. See the description for how to set up project custom fields in order to understand which options there are in terms of field types.




*Issue type custom fields*

The same field can be used by multiple issue types. Click “Add Issue Type” to add a new issue type and to select which fields that should be used for that type.




*New Issue Type*

It is possible to add more fields from this window as well by clicking “Add field”.

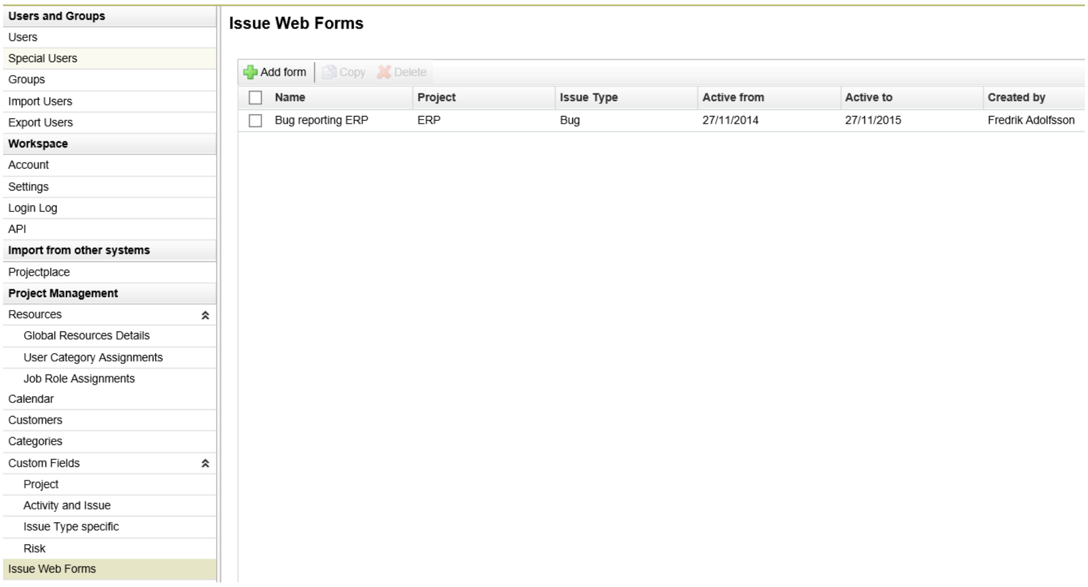
Click “Manage Issue Type” in order to change fields for an existing issue type or in order to delete an issue type.


*Manage Issue Types*

In order to reorder fields, make sure Issue Type “All” is chosen. Fields will always be displayed in the same order regardless of issue type.

### *Issue Web Forms*

In order to facilitate adding issues, especially for users that may not even be users of the issue module, there is a possibility to set up web forms. A web form can be set up for a specific project (or no project) and a specific issue type.

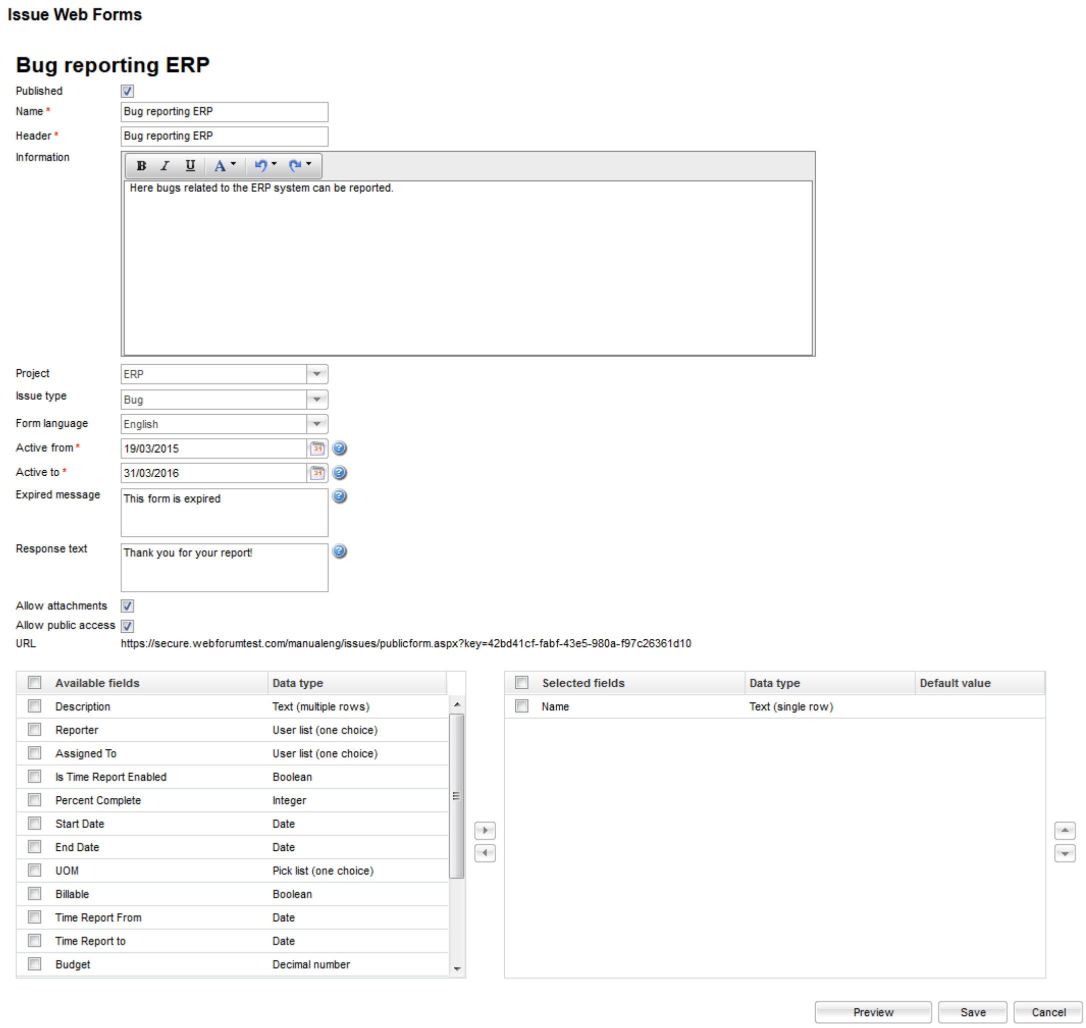



*Issue Web Forms – List*

The form can then be published on the internal and external web pages, which makes it easier for users to report issues without having to open the issue module. Fields that contain user related information are not allowed to be included on external issue forms.

Click on a Web Form name to open the details page.

The details page contains




*Web form –details*

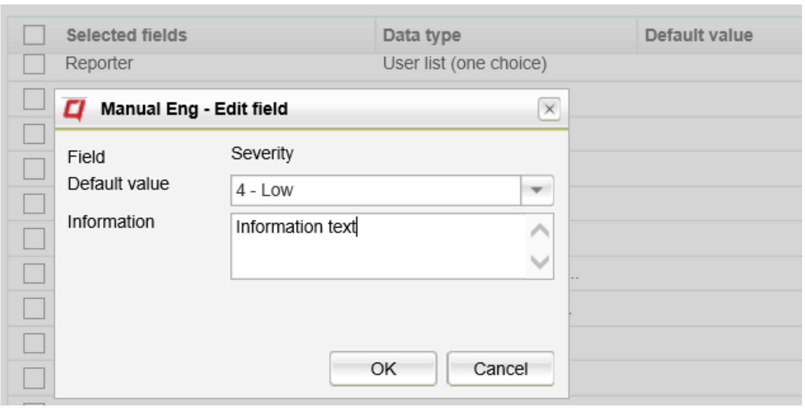
When setting up web forms, it is possible to choose which fields to show on the form. Normally the one reporting an issue does not have to see all fields.

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:

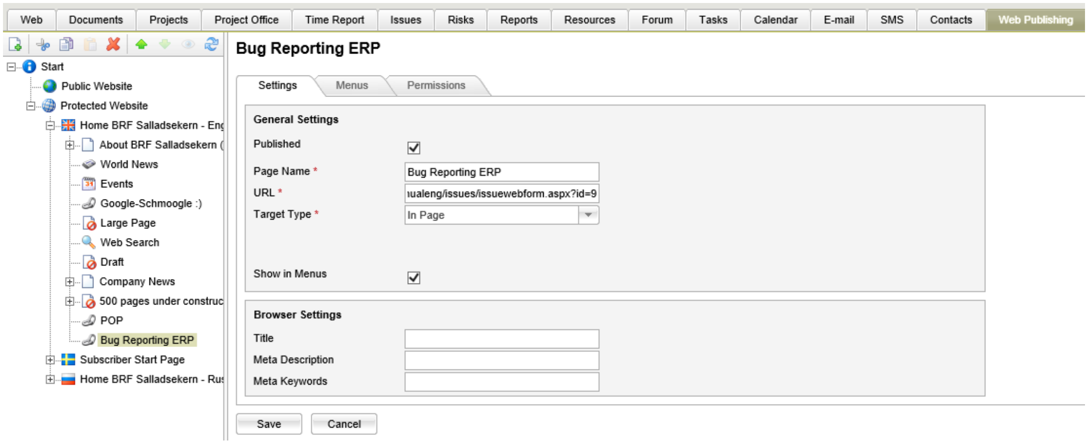
| Field name | Explanation |
|---|---|
| Published | Shows if the link can be used or not |
| Name | Name of the form as displayed in the form list |
| Header | Text displayed as a header when published |
| Information | Text displayed below the header on a published form |
| Project | Project the form 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.



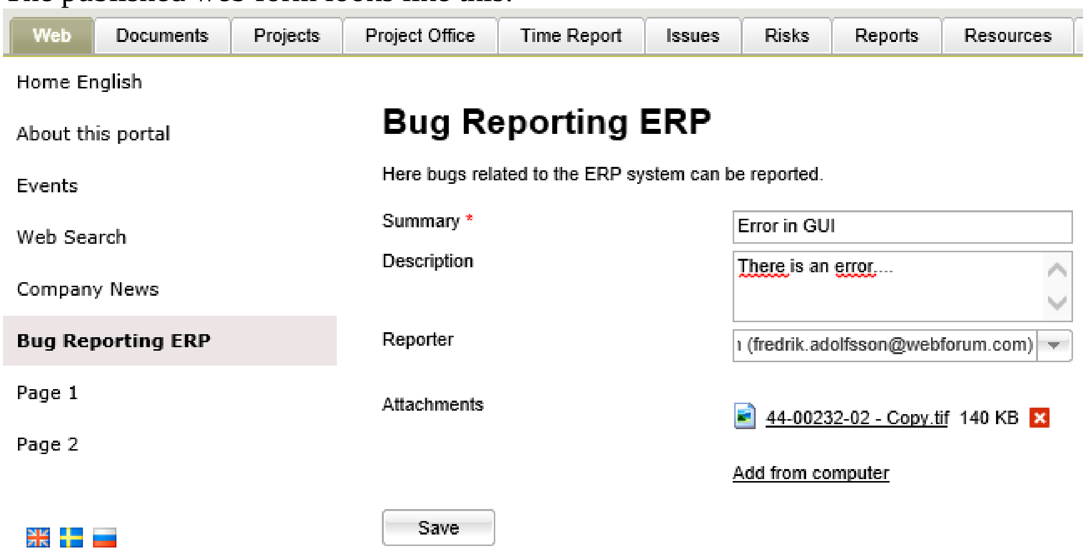

*Edit field*

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*

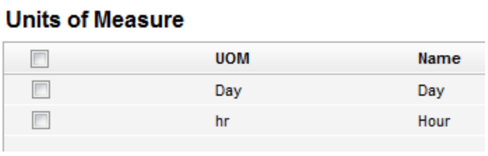
The published web form looks like this:




*Published web form*

## UOM

This is where you add units of measures, “UOM”.




*Units of Measures*

There is one default UOM, hours, set in the system. Units of measures are the units used for budgeting and time reporting. When the resources are people, hours or days are the most frequently used UOM, but the system allows budgeting or reporting related to the use of any type of resource and the corresponding UOM.

Clicking “New” will take you to the UOM Detail window.

**Unit of Measure details**

| UOM * | Name | Description | Enabled |
|---|---|---|---|
| | | | ☑ |

Back Save Cancel

*Unit of Measure details*

### *Currencies*

Different projects can have different reporting currencies. In this window, you select which currencies the users can choose from when setting up new projects. Only enabled currencies will be shown in currency lists.

**Currencies**

| Currency code | Description | Enabled |
|---|---|---|
| ADP | Andorran Peseta | ☑ |
| AED | UAE Dirham | ☐ |
| AFA | Afghani | ☐ |
| ALL | Lek | ☐ |
| AMD | Armenian Dram | ☐ |

*Currencies*

### *Risks Parameters*

Here list values for risk probability and risk consequences are set. It is possible to set values from 1-9 for each parameter.

**Risk parameters**

| Value | Probability | Description |
|---|---|---|
| 1 | Low | |
| 2 | Medium | |
| 3 | High | |

Delete New

| Value | Consequence | Description |
|---|---|---|
| 1 | Minor | |
| 2 | Medium | |
| 3 | Major | |

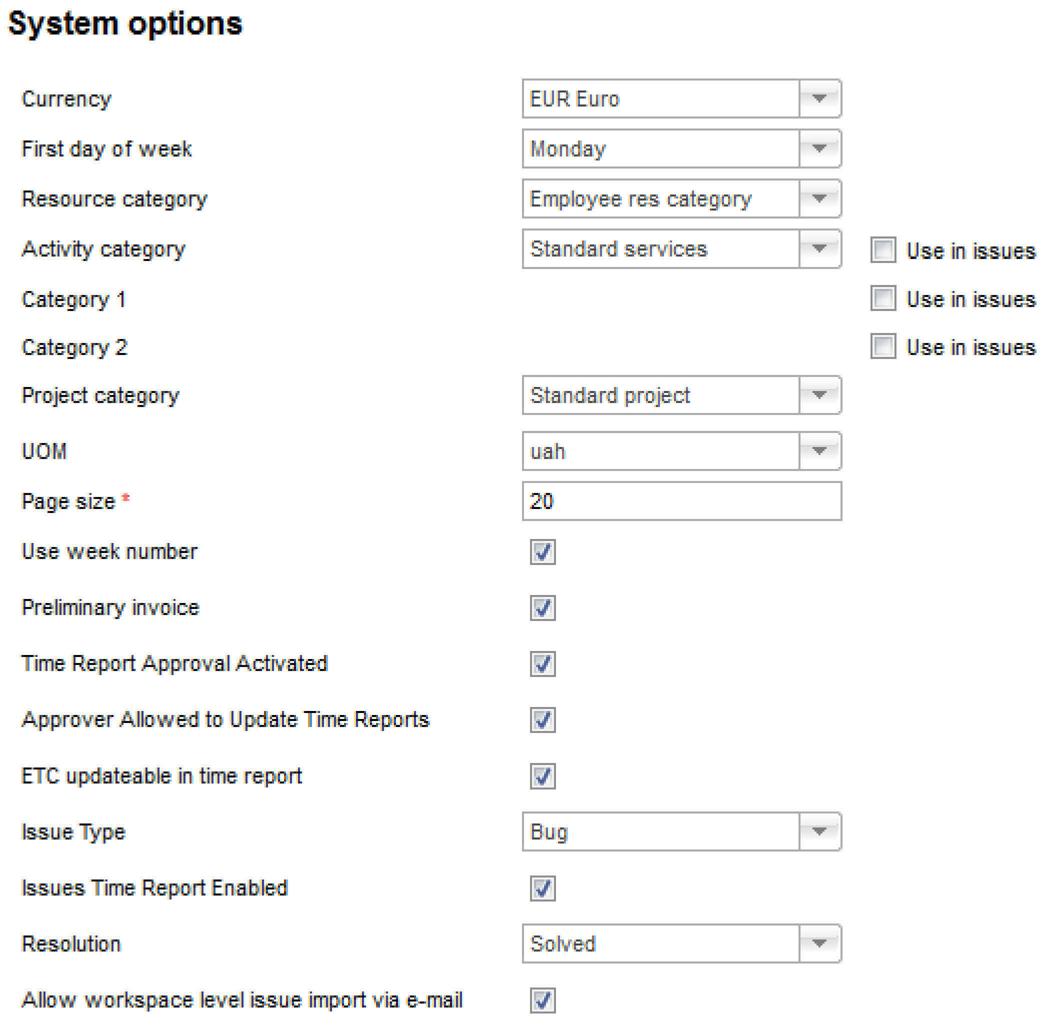
Delete New

Save Cancel

*Risk parameters*

### *System Options*

Here, a number of default settings can be set or changed. The default settings are the ones that the system will suggest unless you choose differently, for instance when logging in.



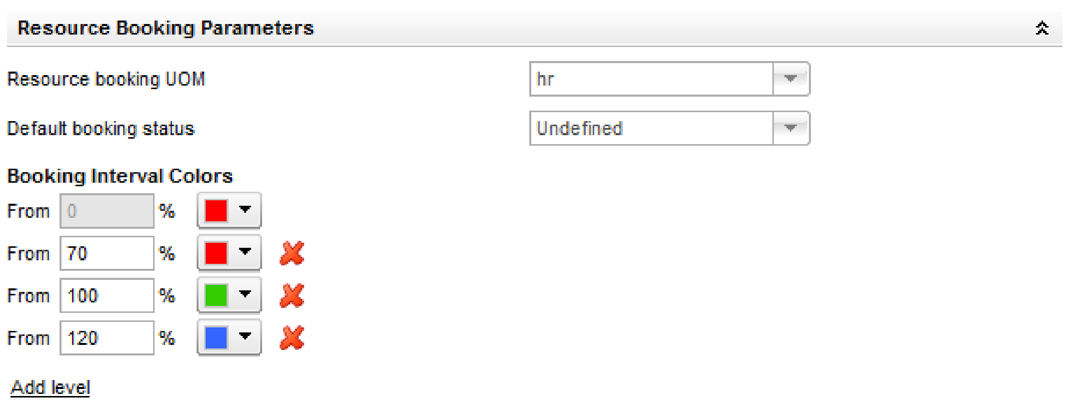
*System Options*

- **Currency** – default currency when setting up new projects
- **First day of the week** – this is normally set to Monday, but depending on the country, this may vary. Please observe that this setting is the same for the whole system and cannot be changed for individual projects.
- **Resource/Activity/Project Categories** – default settings for categories, please see categories for more details. Use in issues – check this if you want activity categories to be displayed for issues as well.
- **Responsibility** – default setting for Menu set up given to new users that are added to the system (see the Teamwork Manual for details).
- **UOM** – default unit of measure when setting up new activities.

- **Page size** – the number of items shown in lists in the system, for instance in the list of projects or customers. If this is set to 20 and there are 50 projects, the project list will contain 3 pages with 20, 20 and 10 projects on them. This setting is the same for all lists in the system.
- **Use week number** – many countries use week numbers as a common way of referring to a specific week. Here you can choose if week numbers should be used. This setting affects whether or not the week number will be shown on the time reporting screen, weekly view.
- **Preliminary invoice** – here you can choose whether you want to create a preliminary invoice when you use the run invoice function. You will then have to approve the invoice before it is finally created. If this is not checked, a real invoice will be created directly.
- **Time Report Approval Activated** – here you can decide whether you want to use the time report approval function or not, see more in the Time Report description
- **Approver Allowed to Update Time Reports** – here you can decide whether an approver is allowed to update time that users have reported or not. Even if this function is not activated, an approver may have the right to update time reports if he/she has update rights on a project and has access to the time report admin tab.
- **ETC Updateable in Time Report** – If this is marked, persons reporting time will be able to update Estimate To Complete on project activities.**Issue type** – Default issue type
- **Issue time report enabled** – Should be checked if persons are allowed to report time on issues
- **Resolution –** Default issue resolution
- **Allow workspace level issue import via e-mail –** if checked, it is possible to send e-mails with issues to the workspace. After the import, issues can be linked to a project.

### Resoure Booking Parameters

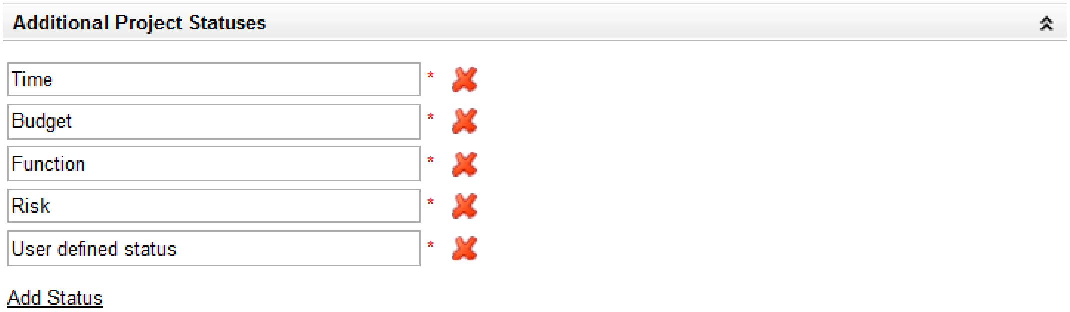
Resource booking parameters are set in System Options. These are further explained under Resource Utilization – Booking



*Resource Booking Parameters*

## Additional Project Statuses

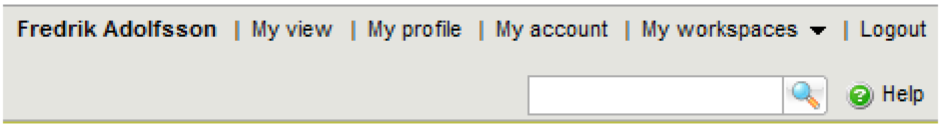
It is possible to add user-defined project statuses that will show up in the Project status area just like pre-set statuses. They can also be added as columns in Project Office. Pre-set statuses can be taken away.




*Add Status*

# Projects/Status reports in My View

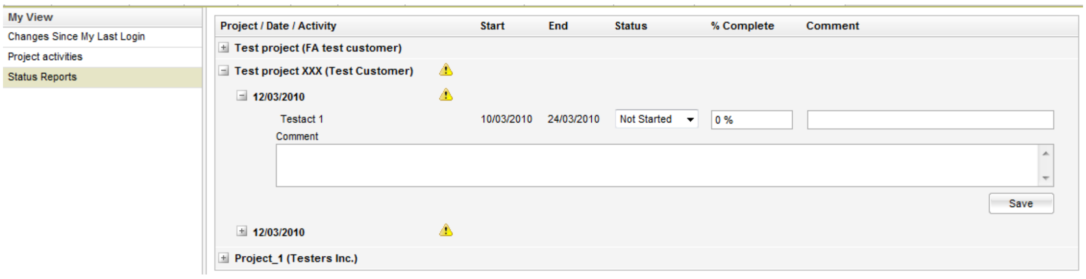
My View is a function that makes it possible to look at various parts of the system with a pesonal perspective. The My View link is located at the top right corner of the system.




*Link to My view*

There are two items under My View that are related to project planning and follow up; Project Activities and Status Reports:


*My View Project Activities*




*Status report section in My View*

The Project Activities section shows not yet finished activities that I am assigned to.

The status report section shows status reports that I have written or am supposed to write. A project manager sends out requests for status reports ad hoc or at given intervals to persons responsible for an activity. Changes to the status or % Complete will change the status and % Complete for the project. Once a report is saved, it cannot be changed. Status reports are displayed as long as the Project status is not "Finished".

Clicking on the project name in My View opens up the project planning tab provided that one has at least read rights on the project plan.

# API

There is an API available for customers that want to extract time reporting data from the system in XML-format. Please contact Webforum for details about the API and how to use it.

# Support & Contact Information

Should you have any questions regarding the tools and functionality of the Workspace, click *Help* in the header to get in contact with the Workspace Operator.

We also recommend that you visit the Webforum homepage at **www.webforum.com** from time to time. Updates and information about new tools and facilities are posted at this site. There is also a section providing answers to frequently asked questions (FAQ) in the Support-section of the website.

If you do not find an answer to your question in the User Manual or at the Webforum homepage, you are welcome to contact either a local or international Webforum support office by sending an e-mail to **support@webforum.com**.

Webforum Europe AB is continually developing and improving the Workspace. Please feel free to contact your Workspace Operator/Administrator or Webforum Europe AB. Your comments and suggestions are important and appreciated!

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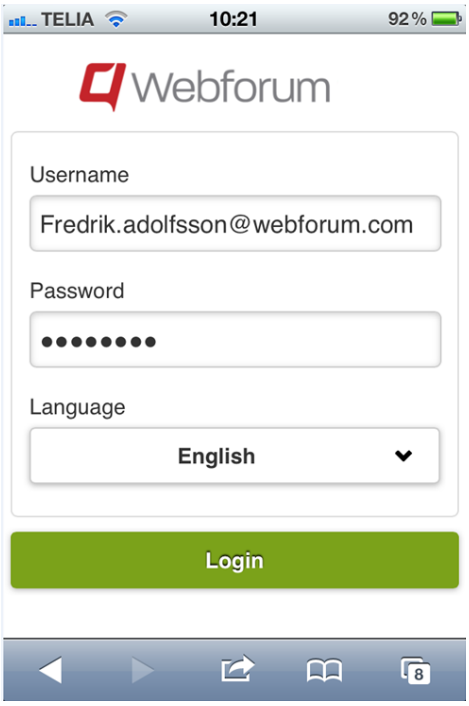
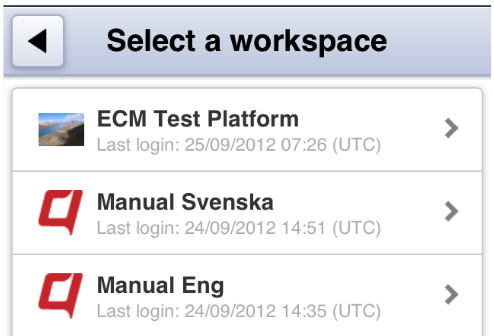
# Appendix 1 Mobile Interface

It is possible to login to a specified workspace via the mobile interface. The normal login page has the workspace URL/login as the address. The mobile login has the workspace URL/mlogin as the address. It is also possible to login from the URL m.webforum.com.



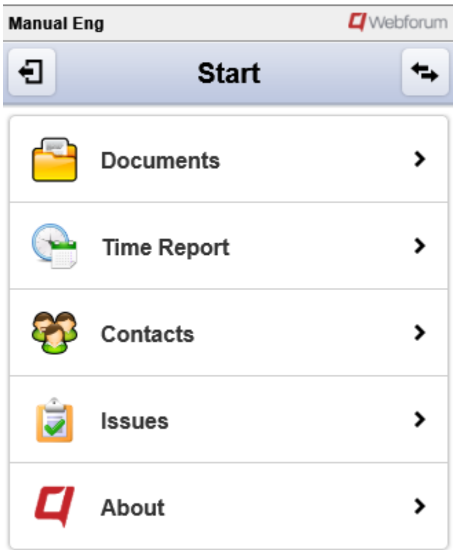

*Mobile login*

Once logged on, you will come to a workspace selection page if you have logged on from m.webforum.com, otherwise you will come directly to the module selection. Click on a workspace name top open it.




*Workspace selection (logon from m.webforum.com)*

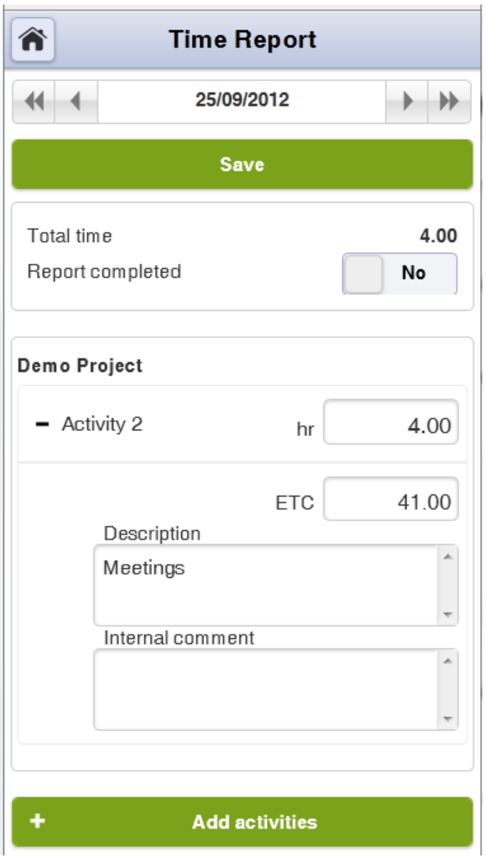
The mobile interface currently has four modules – documents, contacts, time report and issues. Documents and contacts are explained in the Webforum Teamwork manual.




*Module selection*

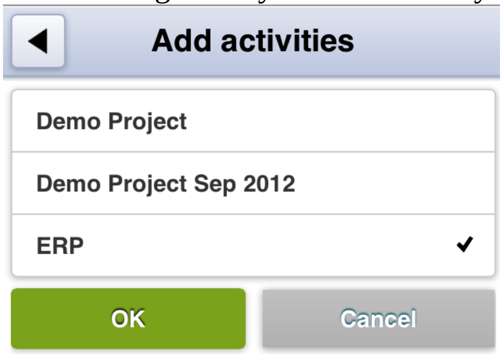
### *Time reporting*

The time reporting lets you report time in a daily mode. It is also possible to set a daily time report to completed. ETC and Comments can be given by expanding the activity.




*Time Reporting*

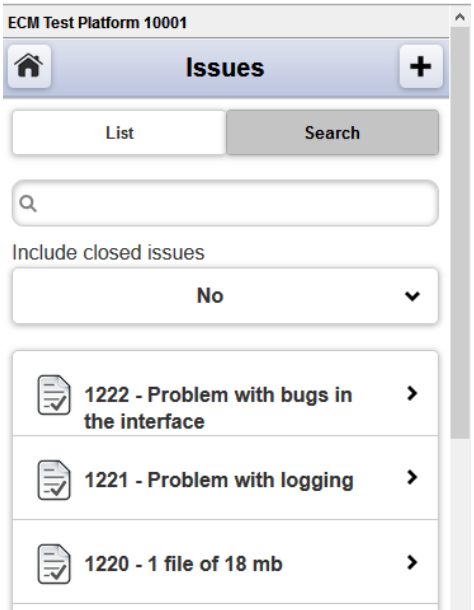
By default, only activities which you have recently reported time on are displayed. In order to add more activities, click "Add activities". This will give a list of projects. Mark a project and click OK in order to add those activities of the project that are assigned to you to the activity list.




*Add activities*

### *Issue management*

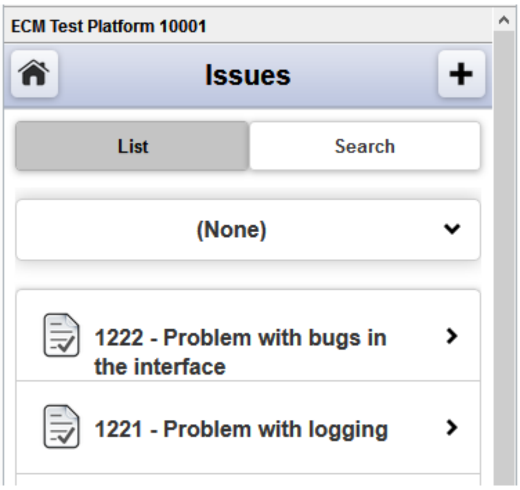
Click "Issues" to open the issue list in search mode.




*Issue search*

From here it is possible to create new issues by clicking the plus sign in the top right corner, search for issues using free text search or open issues.

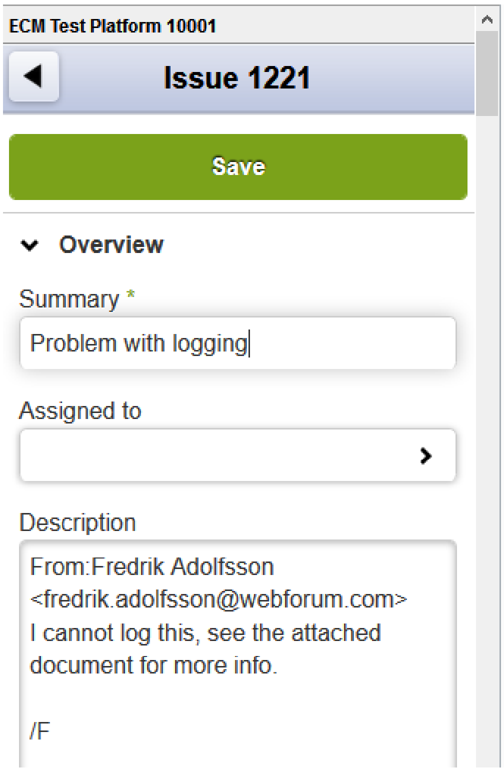
It is also possible to click "List" to open the list view.



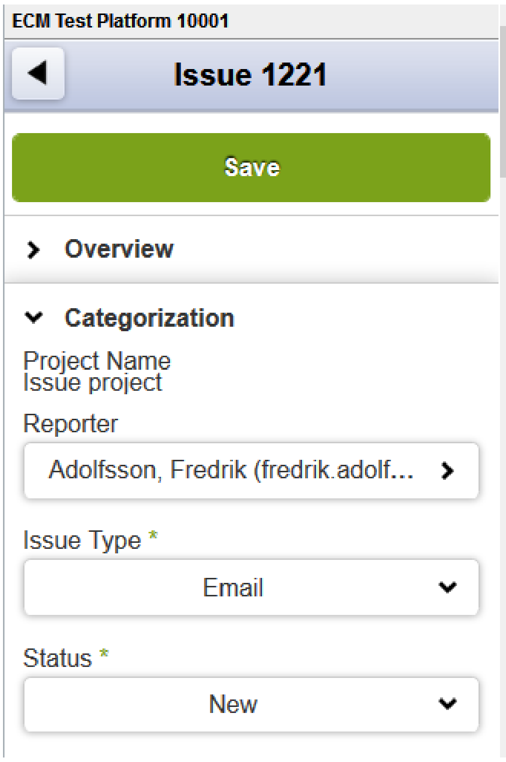

*Issue list*

The issue list view contains all the search filters from the normal web interface.

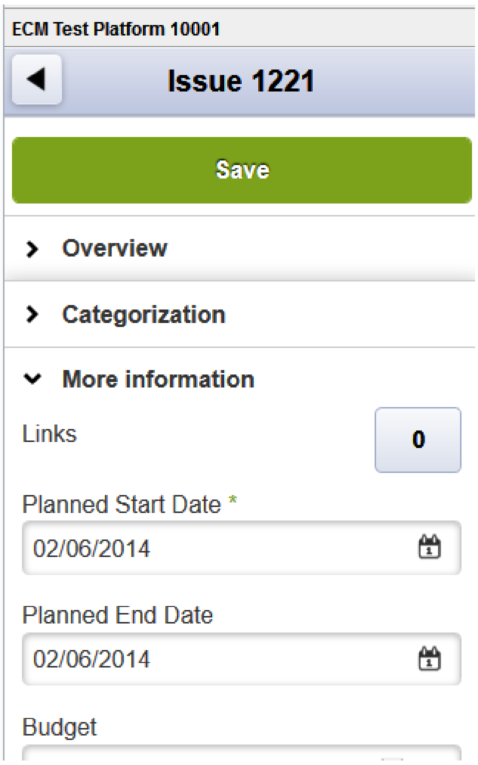
The details view for an issue has three sections; Overview, Categorization and More information.




*Overview*




*Categorization*

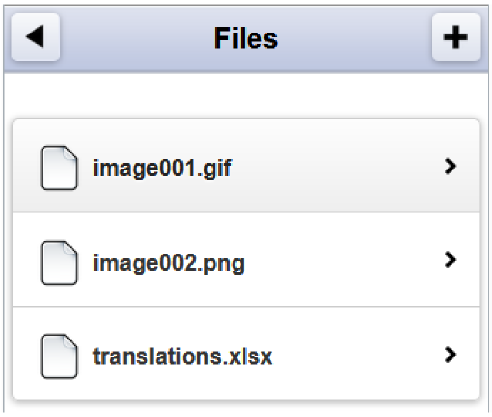



*More information*

The “Overview” primarily contains fields related to the content of the issue, the “Categorization” contains the different flexible fields and “More information” primarily contains planning information.

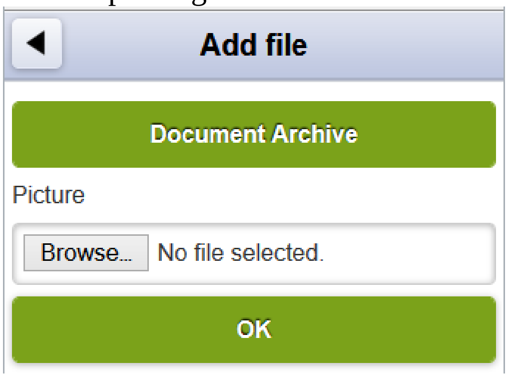
If you want to upload files or pictures, use the files row. Click on the field that displays the number of attached files to either look at or add a file.


*Files*




*Files - details*

Use the plus sign to add more files.




*Add files*

Click browse will work in different ways depending on the browser. On iPhone, there will be an option to take pictures. On a PC, the file archive will be opened.

Click “Document Archive” to add files from the document archive.

# Appendix 2 Reporting and Analysis tool + Charts

### *Reporting Fundamentals*

When creating a report, think just the same way as when you create a report on paper, in excel or similar. All reports contain filters, rows, columns and measures. For instance, if you want to create a report showing how much time different persons, i.e. resources, have spent on a project each month, you can create a report with the following layout:

**Filter:** Project = New Accounting system project Units = Hours

| | **Columns** | | | |
|---|---|---|---|---|
| | 2008 | 2009 | | |
| | Q4 | Q1 | | |
| | Dec | Jan | Feb | **Sum** |
| **Rows** | | | | |
| Person A | 20 | 30 | 10 | 60 |
| Person B | 10 | 10 | 10 | 30 |
| Person C | 10 | 10 | 10 | 30 |
| **Sum** | **40** | **50** | **30** | **120** |

Resources, Time, Projects and Units are called **Dimensions**.
Years and Months are examples of different **Hierarchy** levels. Individual instances of a dimension, such as Person A, are called **Members**.

The following Dimensions and Hierarchies are used (contact Webforum if you want to create additional measures). In addition, Custom Fields for Projects and Activities can be displayed as well.

| **Category** | **Dimension/ Hierarchy levels** | **Description** |
|---|---|---|
| **Measures** | | |
| | Units | Unit is the number of units. The default unit of measure is hours, but it is possible to use days or any other unit of measure that the administrator has chosen to add to the system. In order not to sum up different units with each other, it is important to be sure that you make sure that your selection does not contain different unit types. This can be done by selecting UOM (Unit of Measure) in the Activity Category |
| | Amount | Amount is the value of reported units times the price |
| | Cost | Cost is the value of reported units times the cost |
| **Dimension Categories** | | |

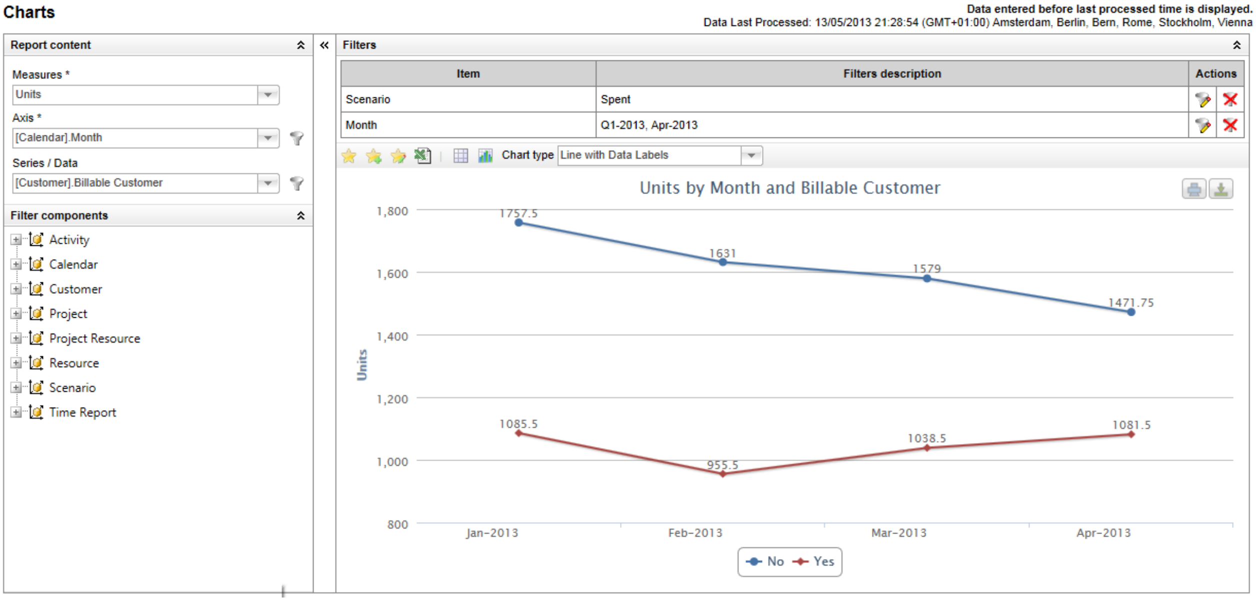
| **Category** | **Dimension/ Hierarchy levels** | **Description** |
|---|---|---|
| Resource | Resource Categories | There is one standard resource category but it is possible to use other categories that the administrator has chosen to add to the system. There are three resource categories in total and each category can have an unlimited number of members. |
| | Resource Name | This is normally the same as users, but if there are other resources added to the system, they will also be available to select. |
| | Resource Type | Shows if the resource is a user, project resource or global resource. |
| Activity | Activity Category | The standard activity category is “Standard”, but it is possible to use any other category that the administrator has chosen to add to the system. Most organizations are not using this dimension. |
| | Activity | The name of the activities as set up when planning projects. This list will show all activities for all projects. |
| | Activity/Issue | Indicates if data is related to Activities, Issues or both. |
| | Activity Status | Displays if the activity is Not Started, In Progress or Finished |
| | Billable | This Dimension indicates if the activity is billable or not, this is mostly of interest for consultancy companies or companies with internal pricing between different functions. |
| | Unit of Measure | Unit of Measure, the default is hours, but it is possible to use any other UOM that the administrator has chosen to add to the system, for instance days. Selecting UOM will give you a list of all UOM |
| | *Custom Fields* | Custom Fields marked as “Analyzable” will be displayed |
| Calendar | Date<br>Month<br>Quarter<br>Week<br>Year<br>Year-Quarter-Month-Date<br>Year-Week-Date | The various date fields allow you to follow up different time periods. Since there are many different ways to follow up periodic data, PM allows you to combine these. For instance, you can select to follow up Years in columns and Months in rows if you want to.<br><br>Year-Quarter-Month-Date is an example of a Hierarchy. By clicking on a certain hierarchy level, it is possible to “drill-down” to the next level. This is a very quick way to move up and down in detail level. |
| Calendar Aggregation<br><br>(charts and analysis beta only) | Acc<br><br>Current<br><br>YTD | displays accumulated values for all periods up until the period displayed<br><br>displays values for the period displayed (current is displayed by default if no Calendar Aggregation member is used in a filter)<br><br>displays year-to-date values |

| **Category** | **Dimension/ Hierarchy levels** | **Description** |
|---|---|---|
| Customer | Billable Customer | Indicates if this Customer should be billed or not. |
| | Customer Name | Customer Name |
| Project | Billable project | Indicates if this Project is billable or not. |
| | Currency code | Currency. It is important to choose currency if you are analyzing projects with different currencies. Otherwise the amounts indicated will be a mixture of different currencies. |
| | Project Manager | The name of the Project Manager |
| | Project Categories | Using project categories is a way to follow up projects of various categories. The categories are set by the administrator. There are a total of three project categories and each of them can have an unlimited number of members. |
| | Project Name | The name of the project (there are two dimensions, one for project names and one divided into Parent Project and child projects |
| | Project Status | Indicates if the Project is Started, In Progress or Finished |
| | *Custom Fields* | Custom Fields marked as “Analyzable” will be displayed |
| | | |
| Time Report | Billable | Indicates if reported time on the combination of project, activity and resource is billable or not |
| | Invoiced | Indicates if a certain time spent has been invoiced or not |
| | Completed | Indicates if a report value is completed or not |
| | Approved | Indicated if a report value is approved or not |
| Resource Booking Status | | See Resource Utilization – Booking for a description of bookin status. |
| Scenario | Values:<br>Booking<br>Baseline<br>Budget<br>Spent<br>ETC<br>Forecast | Gives a possibility to follow up units and amounts spent as well as the booking, baseline, budget, estimate to complete “ETC” and forecasts.<br><br>As opposed to all other dimensions, the top level is not the sum of the lower levels in this dimension.<br><br>ETC and Forecast values for the time left in a project are automatically divided up on the weekdays that are left for each of the activities in the project. The division is done by person provided that persons have been assigned to activities.<br>This means that the reporting and analysis function can be used for resource planning as well as income/cost forecasts by time period. |

The basic concepts for creating analysis and charts are the same, but due to the nature of charts, there are less options when creating charts. If you are not used to multidimensional analysis, it could be easier to start by creating a chart.

### *How to create a chart*

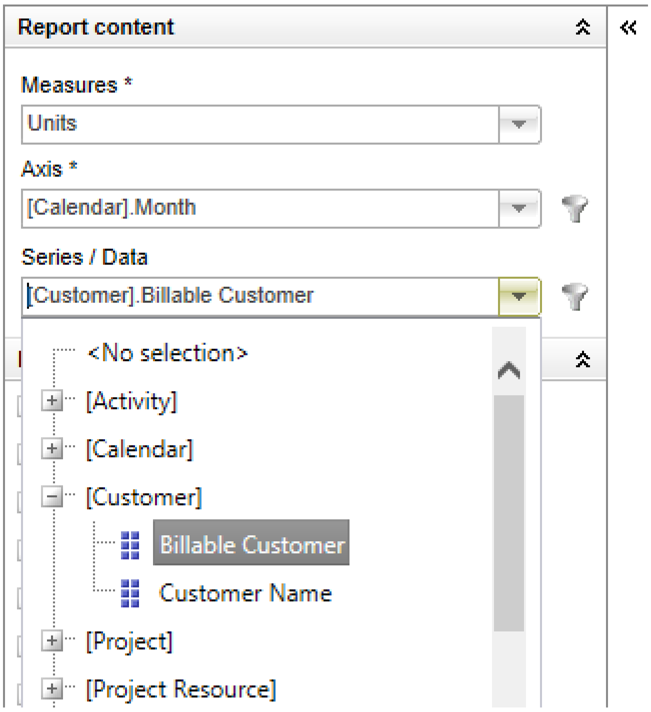
This function makes it possible to quickly analyze data using charts. The chart report creator works in a similar way to how the Report & analysis function works, but with a limit to the number of dimensions displayed at any given time.




*Charts*

The charts function has a few different sections, one for report content selection, one for filter components selection, one for filters displayed and one for report content displayed.

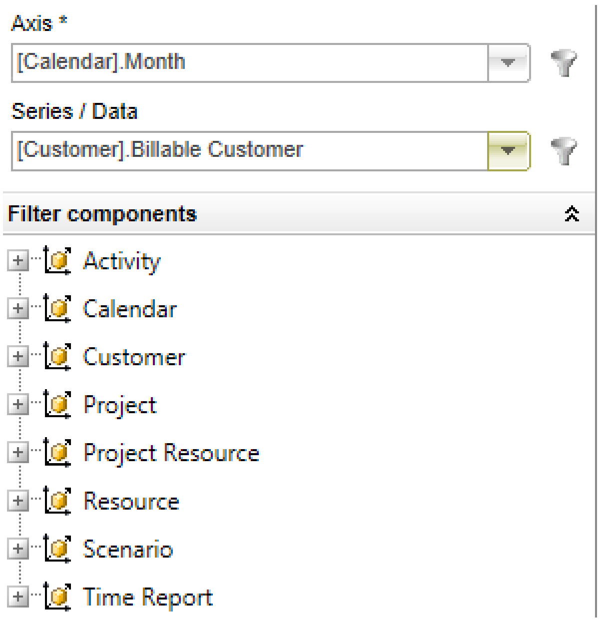
Report content selection




A report can display one measure at a time. It is also necessary to choose one dimension to display on an axis, in this case months. It is optional to choose a dimension to be displayed as series/data, but in this example "Billable Customer" is chosen.

### *Filters*

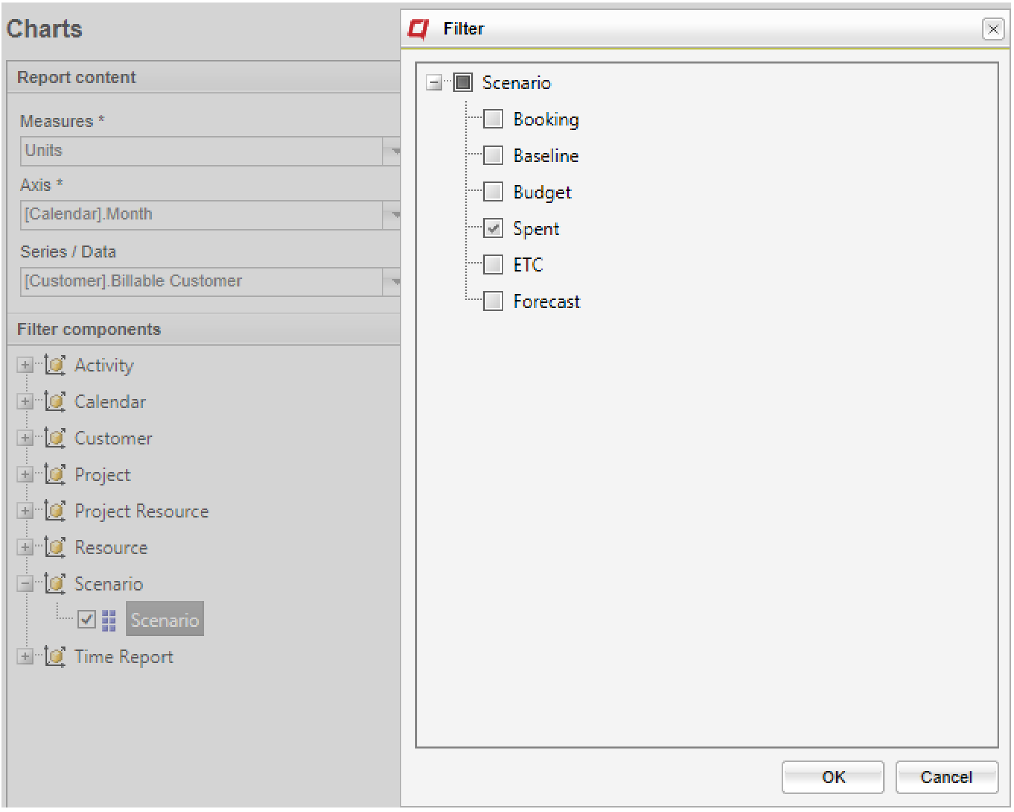
Limit the axis or series/data values displayed by clicking the funnel icon  next to the dimension.



*Filter selection*

Limit the report in terms of other dimensions by clicking on the dimension in the "Filter components" section.

When either the funnel icon or a dimension in Filter components is clicked, the "Filter" dialog will be displayed and it is possible to choose exactly which values to display.




*Filter selection*

The chosen values are shown in the "Filters" list. It is possible to edit or delete filters here.

**Filters**

| Item | Filters description | Actions |
|---|---|---|
| Scenario | Spent | |
| Month | Q1-2013, Apr-2013 | |

*Current filters*

The report content is displayed using the Webforum standar chart component. It is possible to save, edit and display reports using the star icons.

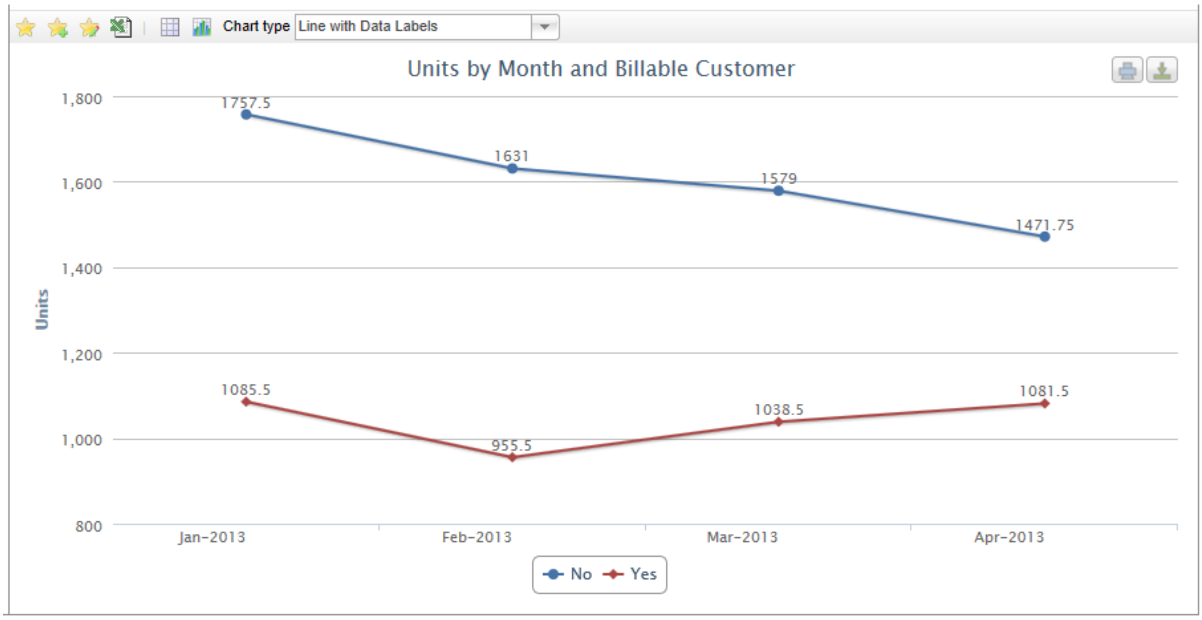



*Chart mode*

The excel icon exports data to excel and the grid icon changes display mode to values displayed in a grid

**Units by Month and Billable Customer**

Units

| Billable Customer | Jan-2013 | Feb-2013 | Mar-2013 | Apr-2013 | Sum |
|---|---|---|---|---|---|
| **No** | 1,757.50 | 1,631.00 | 1,579.00 | 1,471.75 | **6,439.25** |
| **Yes** | 1,085.50 | 955.50 | 1,038.50 | 1,081.50 | **4,161.00** |
| **Sum** | **2,843.00** | **2,586.50** | **2,617.50** | **2,553.25** | **10,600.25** |

Month

*Grid mode*

There are a number of chart types to choose from when in chart mode and most of them are self explanatory:

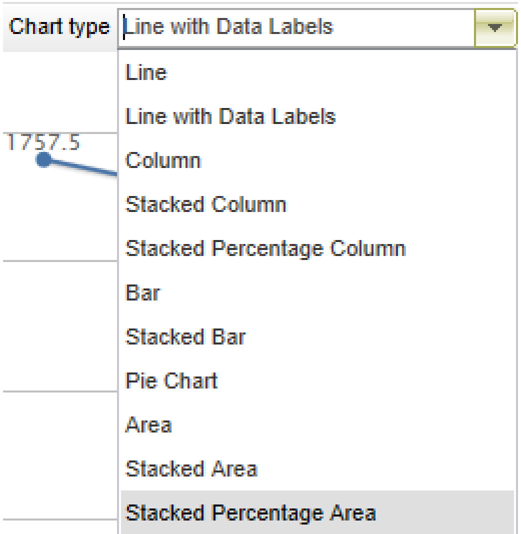


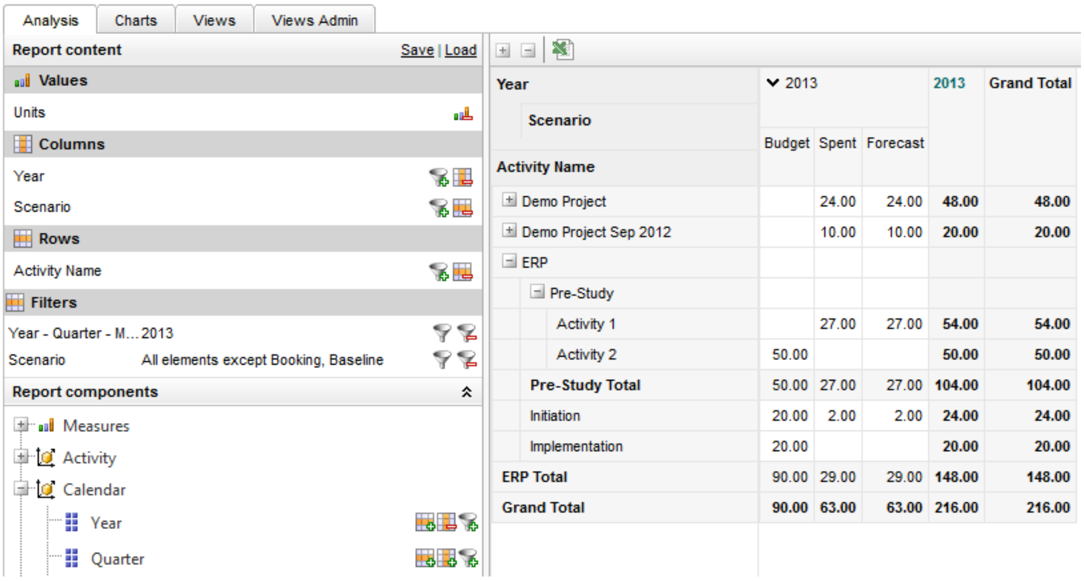

*Chart types*

Not all graphs can display all data. A pie chart, for instance, can only display axis values and not series/data values.

## *Report & Analysis*

The report & analysis function is set up to support the creation of virtually any type of numeric report. This is done by choosing from the different objects that are used in the system and then placing them in a report structure that you will be able to see on the screen.

The screen layout looks like this:

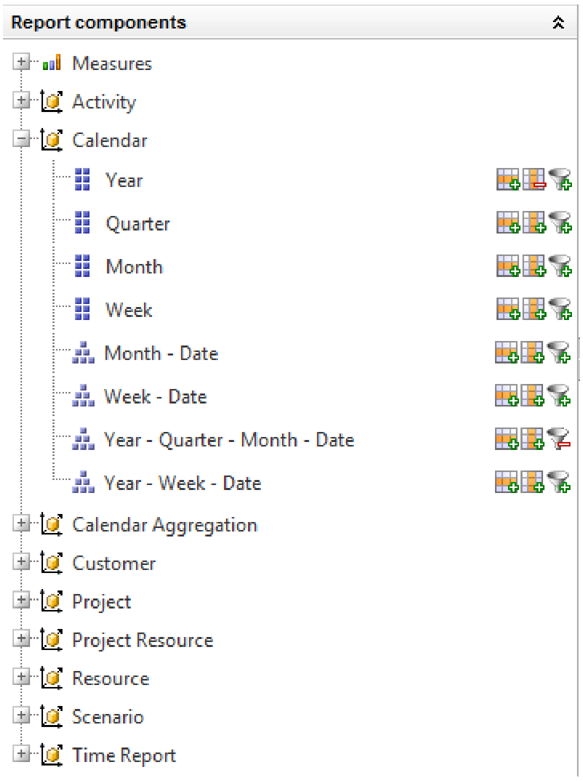



*Reports and Analysis screen layout*

The screen consists of 5 major areas:

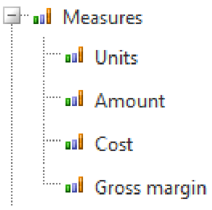
| Area | Description |
|---|---|
| Values area | Items that you want to see as values in a report should be placed here by using drag&drop |
| Rows area | Items that you want to see as rows in a report should be placed here by using drag&drop |
| Columns area | Items that you want to see as columns in a report should be placed here by using drag&drop |
| Filter area | Items that you want to see as filters in a report, should be placed here by using drag&drop. I.e. if the report should only include values for a specific project or for a specific customer those dimensions may be placed here. |
| Report components area | Here you find all the different items that you can analyze and report on. They are described in further detail below. |
| Report area | The main panel. In this area, the report will be displayed |

Dimensions and Hierarchies are found in the Cube Structure area.

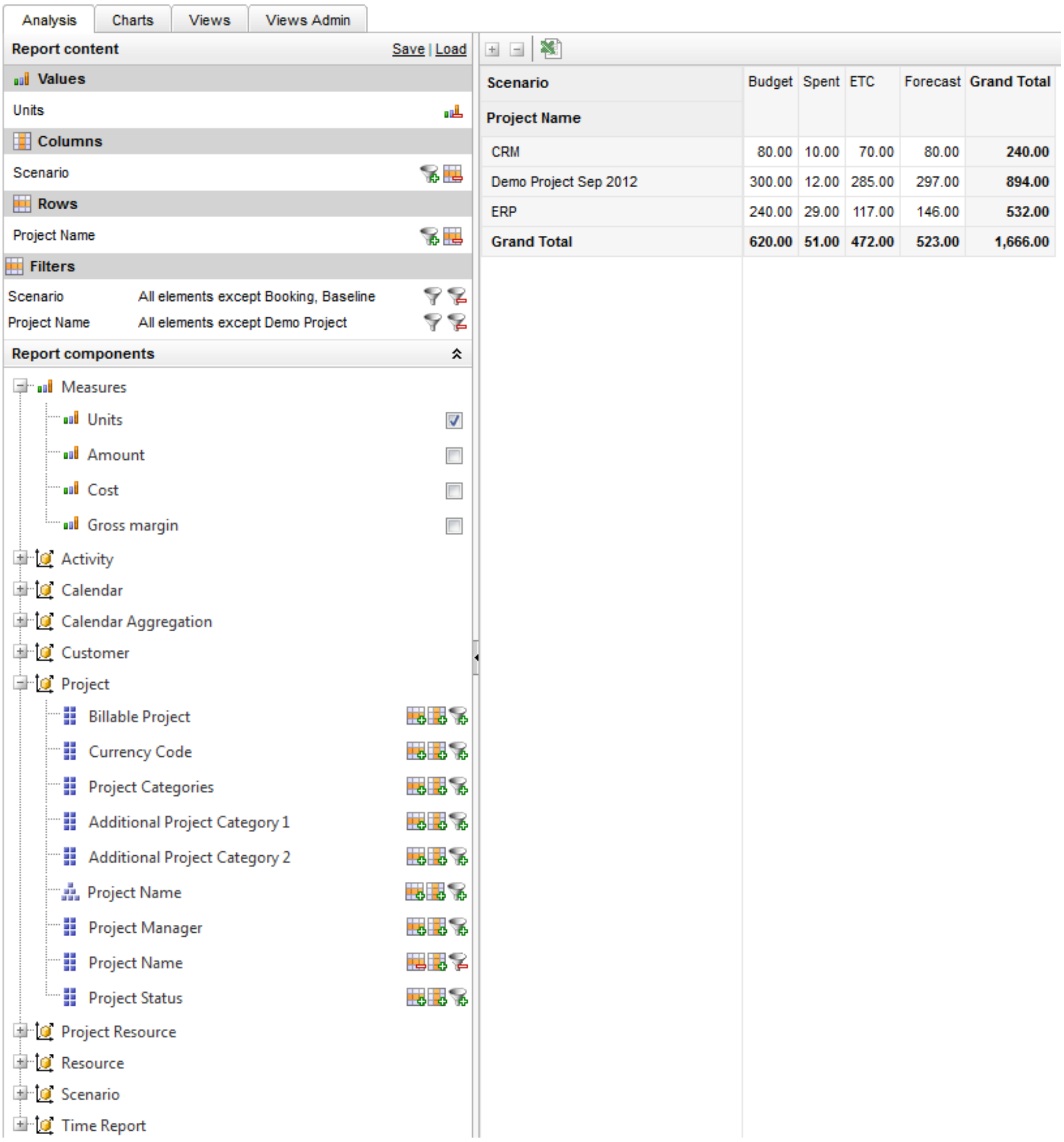



*Dimensions and Hierarchies by Category.*

In order to create a report like the one above in PM, you go to the report component area and choose the fields that you are about to use. Start by clicking the arrow next to the measures symbol   . Below measures click on the arrow next to “Time Report”. Here you have a choice of amount, cost and units.




In this example you select units and drag it to the Measures area that you find in the top left corner. When this is done, the total of all units stored in the system will appear in the report area in the middle of the screen.



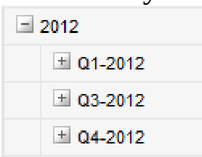

*Report layout*

The next step is to select filters. Select the Project row in the structure area. Under projects, select project name and drag it to the filter area, which you find in the top part of the window. When doing this, you will automatically get the filter pop-up window where you can filter on which members to see. This is explained in more details under “Filtering” below. When this is done, the units in the measures area will be filtered so that only the units spent in the selected project will be shown. If you want to make further changes to the filter or clear all filters, choose the corresponding symbols at the right of the filter row, choose for changing filters and in order to clear all filters.

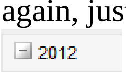
The next filter to select is the type of units. In this case the only unit that was used in the project was hours, but the selection of units is more important when, for instance, a set of projects are analyzed and they have different units in the system, for instance when one project is using days as unit and another project is using hours.

Once the measures and filters have been selected, rows and columns can be chosen in the same manner. Drag the Resources dimension to the row area and the bottom left corner, just above the measures area. Then select the resources you want to follow up. By pressing the icon next to “Resource”, you can filter the resource in the same way as projects.


When selecting the date dimension there are a number of different options to choose from. dimension that has the Year/Month structure. Drag the Date dimension to the columns area in the middle of the screen and select the years and months you want to follow up in the same way as for resources or press the hierarchy symbol next to a member if you want to drill down to a lower level.

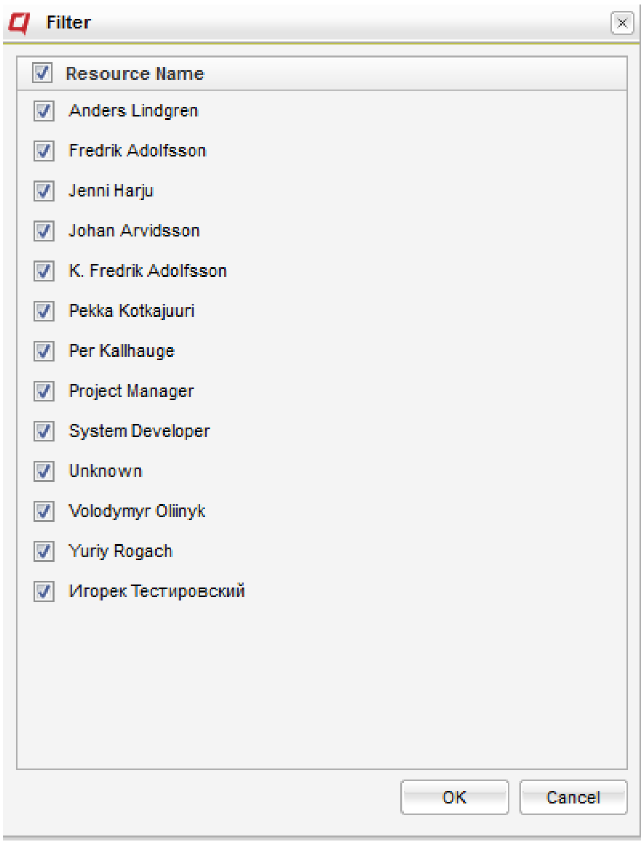



I.e. if you press the hierarchy symbol next to “Year” in a Year-Quarter-Month-Day dimension, you will automatically drill down to Quarter. If you want to collapse 2009 again, just press the minus sign next to 2009:




### *Filtering*

The Report filtering function is very strong. By right clicking a dimension, the filter pop-up window will appear.




*Filters*

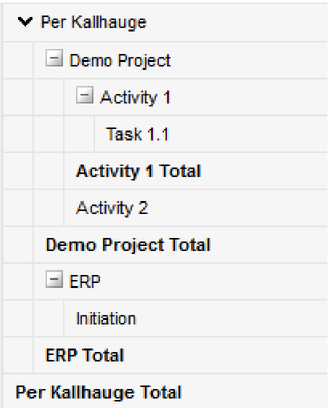
In the filter window, you can select/deselect members in order to display a subset of the members.

## *Advanced reports*

**More than one dimension on rows or columns**

Once you know the basics of reporting building, you may want to try out more advanced reports. One way of creating advanced reports is to have more than one dimension on either rows or columns. For instance, in the report shown above, you may want to know which activities a certain resource has spent time on. If you open the activity category and choose activity name, you can then drag the name to the row area and place in just below “Resource”. You will now see that a plus sign appears next to the resource.

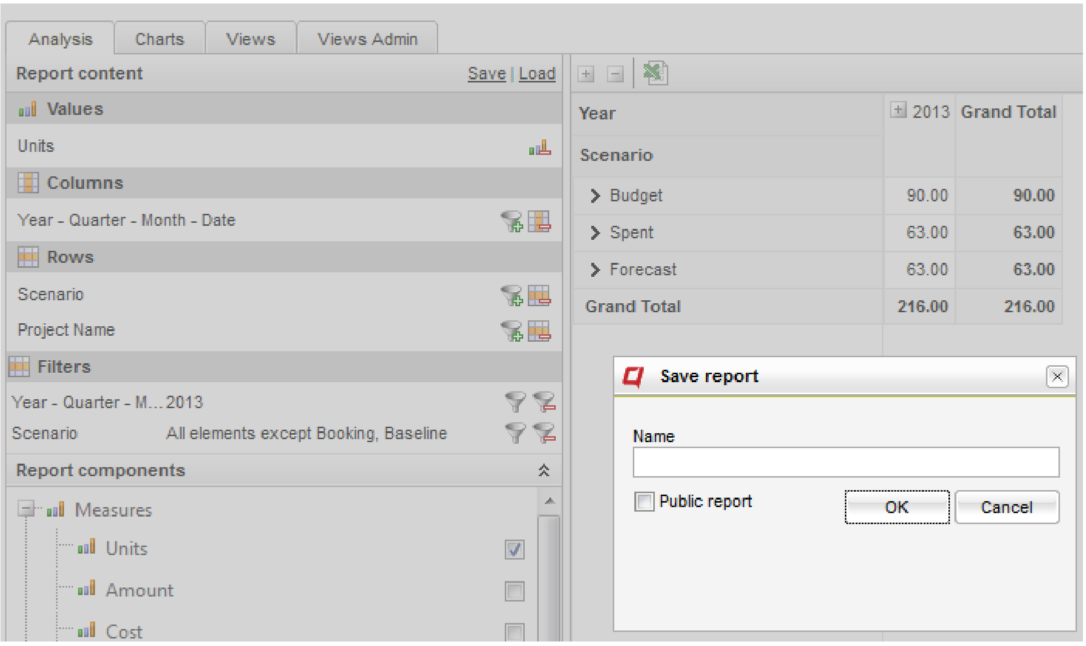
If you click the plus sign, all activities that this resource has spent time on will appear:




If you then click the minus sign, you will collapse the activities again.
You can also drag the "Activity name" and place it before the "Resource" name in the row area. This way it is possible to see which resources that have spent time on a certain activity. You can of course to the same thing with column dimensions just by dragging the "Resource" or "Activity name" dimensions to the column area.

## *Printing, Exporting and Saving reports*

Reports can be printed, exported and saved. This is done using the corresponding toolbar which is located in the top left corner.


*Exporting and managing reports*

Reports that are saved can be saved either as personal reports in the system or as global reports. Global reports are visible for all users with access to the reporting tool. If you open a report, it will automatically display the report content. The report which is first in the list (alphabetic order) will automatically be shown when you open the reporting menu.

Please note that all reports will display the values that are currently corresponding to the selection critera, i.e. if you have saved a report with a certain value for Quarter 1 in February, the report will also display March values if you open the report in March. This means that if you create a report containing data from project A and project B and a person who is watching the report will only have access to project A, that user will only see project A data.

If you want to save or export a fixed view of a report, this is possible using either the PDF or Excel buttons in the toolbar. Pressing these buttons will open the corresponding program with the report and you then use the PDF or Excel standard functions in order to save or print the reports.