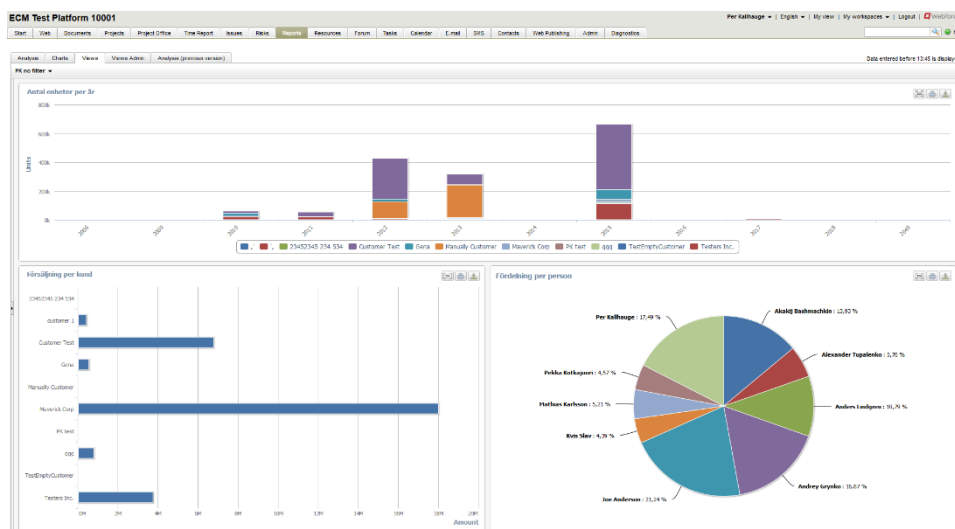
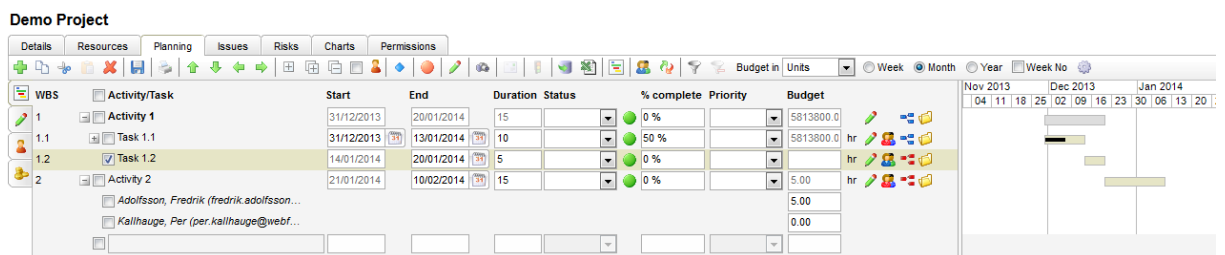


Webforum Project Management

User and Administration Manual



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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.

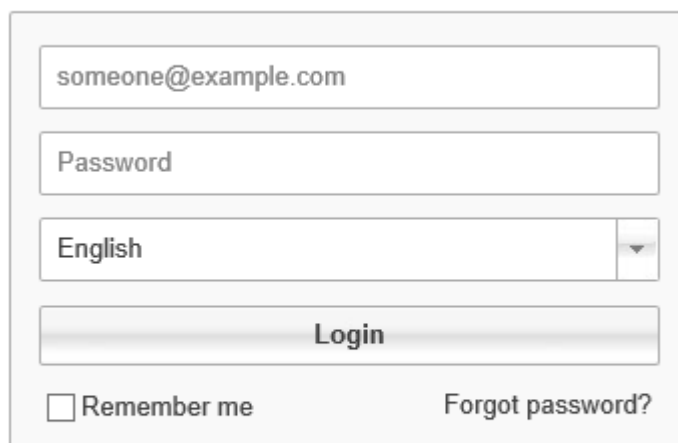
Logging in

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**.

Manual Eng



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

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

Provided by Webforum

Webforum login window

Multilingual Workspace

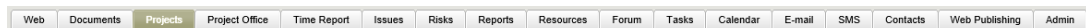
The Workspace is available in several languages. A drop down menu is available, from where you can select your preferred language.



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.

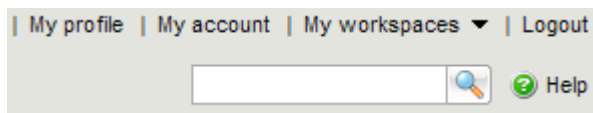
Layout of the Workspace

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.

Projects

The screenshot shows the 'Projects' form interface. On the left is a sidebar with various filters and search options. The main area displays a table of projects.

Filters Sidebar:

- Filters: (None)
- Manage Filters / Save Filter
- Clear Filter / Search
- Search: [Text Input]
- Project Name: [Dropdown]
- Project number: [Text Input]
- Status: [Dropdown]
- Customer name: [Dropdown]
- Reference: [Text Input]
- Enabled: [Dropdown]
- Project Categories: [Dropdown]
- Additional Category 1: [Dropdown]
- Additional Category 2: [Dropdown]
- Portfolio: [Dropdown]
- Project Manager: [Dropdown]
- Project Template: [Dropdown]
- Custom Fields:
 - Organization: [Dropdown]
 - Priority: [Dropdown]

Project Table:

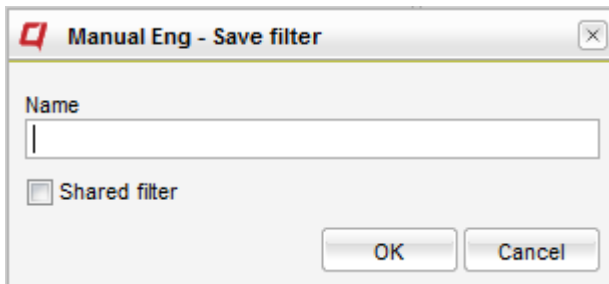
☐	Project	Customer	Proj No	Phase progress	Status	Billable	Enabled	Documents
☐	Fa test	Internal	2011			No	Yes	
☐	Demo Project	Internal	2003		Not Started	No	Yes	
☐	Product Launch X	Internal	2008			Yes	Yes	
☐	CRM	Internal	2005			No	Yes	
☐	ERP	Internal	2004		In Progress	No	Yes	
☐	Project Launch Y	Internal	2009			No	Yes	
☐	Template 1	The Consult	2010			Yes	Yes	
☐	Demo Project Sep 2012	Internal	2007			No	Yes	
☐	Billing system	Westing	2006			No	Yes	

Project listing

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

Filter

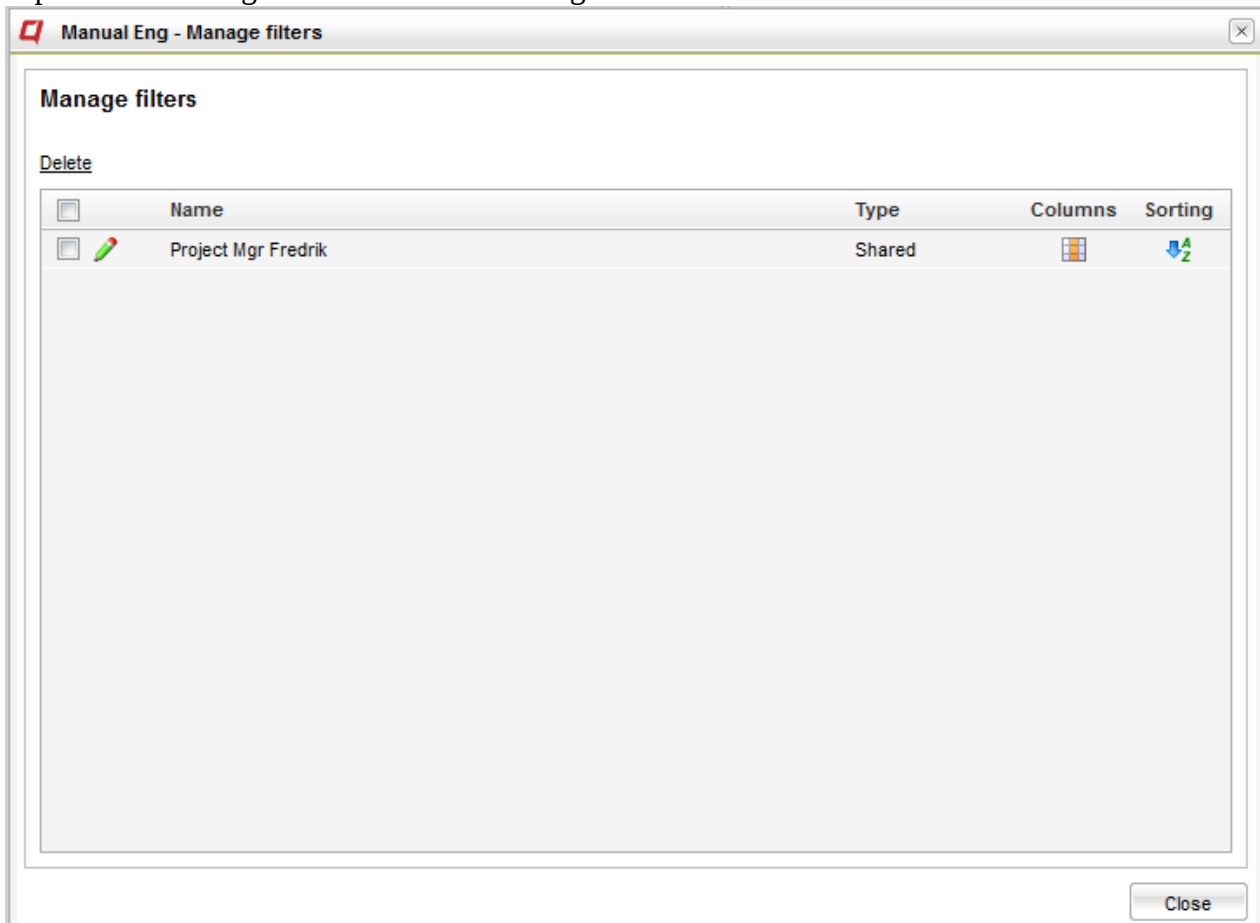
It is possible to save different filters by clicking “Save Filter”. When saving a filter, it is possible to choose the “Shared filter” option so that others can use the filter. Project level permission settings will still be applied for each specific project shown in the list.



A dialog box titled "Manual Eng - Save filter" with a close button (X) in the top right corner. It contains a text input field labeled "Name" with a cursor inside. Below the input field is a checkbox labeled "Shared filter". At the bottom right are two buttons: "OK" and "Cancel".

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.



A dialog box titled "Manual Eng - Manage filters" with a close button (X) in the top right corner. It has a section titled "Manage filters" with a "Delete" link. Below this is a table with the following columns: Name, Type, Columns, and Sorting. The table contains one row for a filter named "Project Mgr Fredrik" which is of type "Shared". The "Columns" column shows a grid icon, and the "Sorting" column shows a blue arrow pointing down with the number 2. At the bottom right of the dialog is a "Close" button.

Name	Type	Columns	Sorting
Project Mgr Fredrik	Shared		 2

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.

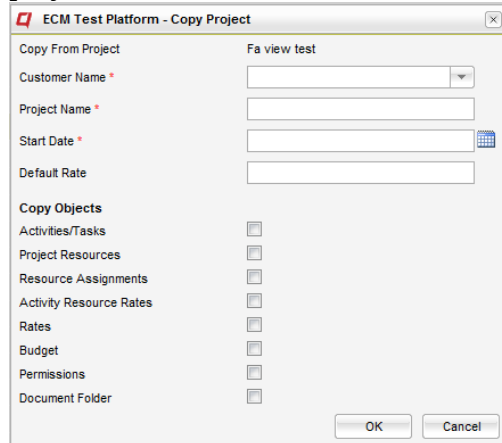
Import – Imports a project, see details below.

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.

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.



The dialog box titled "ECM Test Platform - Copy Project" contains the following fields and options:

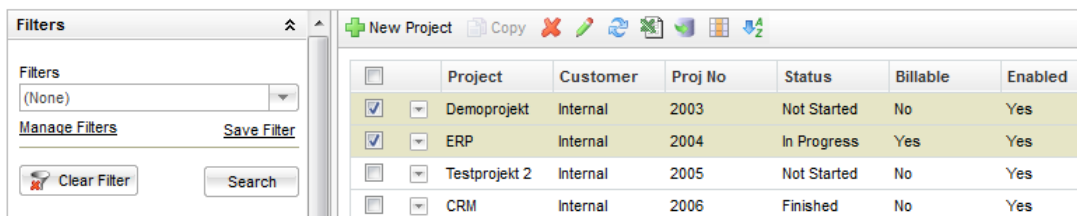
- Copy From Project:** A dropdown menu with "Fa view test" selected.
- Customer Name *:** A text input field.
- Project Name *:** A text input field.
- Start Date *:** A date picker.
- Default Rate:** A text input field.
- Copy Objects:** A list of checkboxes:
 - Activities/Tasks
 - Project Resources
 - Resource Assignments
 - Activity Resource Rates
 - Rates
 - Budget
 - Permissions
 - Document Folder
- Buttons:** "OK" and "Cancel" at the bottom right.

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.

Projects



The screenshot shows a "Projects" view with a toolbar and a table of projects. The toolbar includes icons for "New Project", "Copy", "Delete", "Edit" (pen icon), "Refresh", "Print", "Export", and "Import".

	Project	Customer	Proj No	Status	Billable	Enabled
☒	Demoprojekt	Internal	2003	Not Started	No	Yes
☒	ERP	Internal	2004	In Progress	Yes	Yes
☐	Testprojekt 2	Internal	2005	Not Started	No	Yes
☐	CRM	Internal	2006	Finished	No	Yes

On the left, there is a "Filters" section with a dropdown menu set to "(None)", a "Manage Filters" link, a "Save Filter" button, a "Clear Filter" button, and a "Search" button.

The pen icon in the toolbar opens the mass update dialog

Manual Svenska - Mass update

OK Cancel

Details

Customer Name * Internal Status (Different values) Currency * EUR Euro

Default Rate 0.00 Default Cost 0.00

Project start date * (Different values) Project End Date (Different values) Parent Project

Project Categories * Standard Project Kategori 2 Standard Kategori 3 Standard

Project Manager (Different values) Progress Bar Based On % Complete Project Office Gantt Bar Color

Enable in Project Office Yes Enable Project Folder No Show in Start and My View (Different values)

Project Template Billable (Different values) Enabled Yes

Custom Fields

Organisation (Different values) Prioritet * 5 Land (All) (Different value)

Project Status

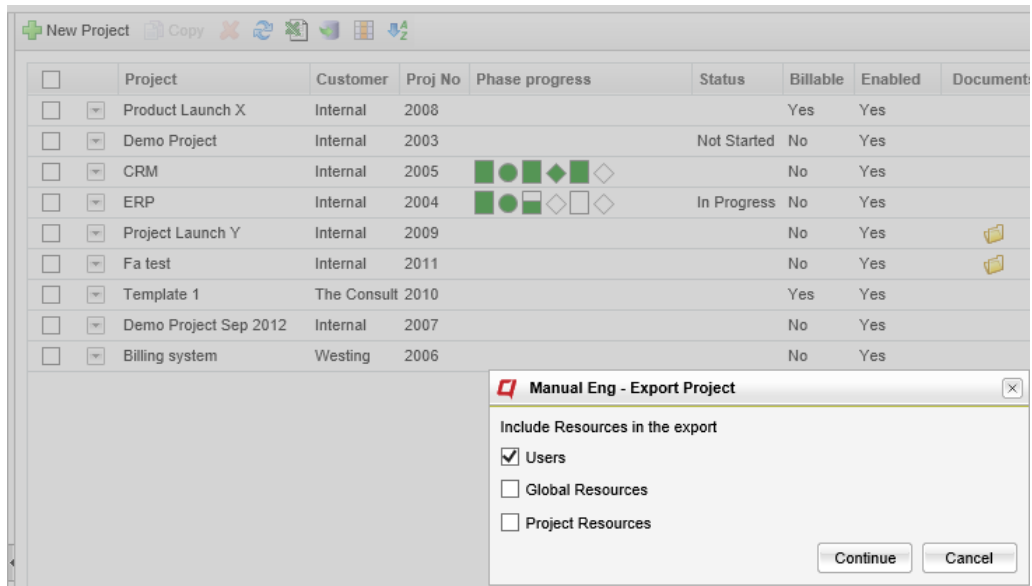
Comments Published

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

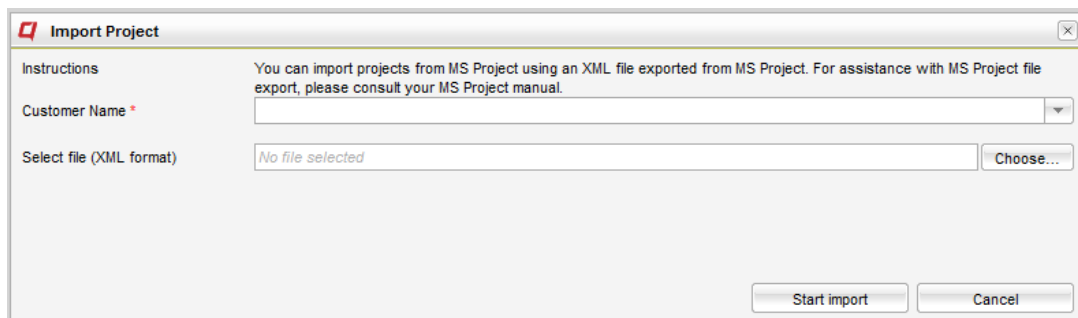
The users & other resources will be displayed in a separate column, just like other fields, but there will be one row per resource in a project.

	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 Started	No	Yes		Adolfsson, Fredrik (fredrik.adolfsson@webforum.com)
5									Arvidsson, Johan (johan.arvidsson@webforum.com)
6									Kallhauge, Per (per.kallhauge@webforum.com)
7									Kotkajuuri, Pekka (pekka.kotkajuuri@webforum.com)
8									
9	CRM	Internal	2005	●●●◆◇		No	Yes		
10	ERP	Internal	2004	●●◆◇◇	In Progress	No	Yes		
11									Adolfsson, Fredrik (fredrik.adolfsson@webforum.com)
12									Kallhauge, Per (per.kallhauge@webforum.com)
13	Project Launch Y	Internal	2009			No	Yes	https://secure.webforumtest.com/manualeng/doc/?dfRefID=8	
14	Fa test	Internal	2011			No	Yes	https://secure.webforumtest.com/manualeng/doc/?dfRefID=10	
15	Template 1	The Consulting Compar	2010			Yes	Yes		
16	Demo Project Sep 2012	Internal	2007			No	Yes		
17									Adolfsson, Fredrik (fredrik.adolfsson@webforum.com)
18	Billing system	Westing	2006			No	Yes		

Export file

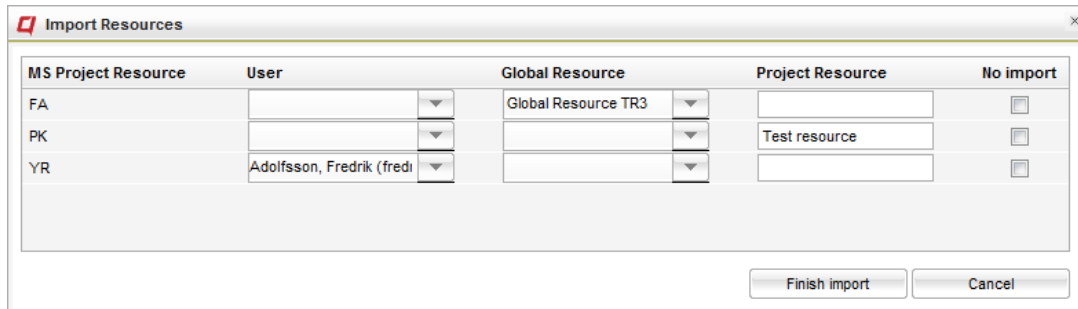
Import Project

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.



The 'Import Resources' dialog box contains a table with five columns: MS Project Resource, User, Global Resource, Project Resource, and No import. The 'MS Project Resource' column lists FA, PK, and YR. The 'User' column has a dropdown menu with 'Adolfsson, Fredrik (fredi)' selected. The 'Global Resource' column has a dropdown menu with 'Global Resource TR3' selected. The 'Project Resource' column has a text input field with 'Test resource' entered. The 'No import' column has three checkboxes, all of which are unchecked. At the bottom right, there are 'Finish import' and 'Cancel' buttons.

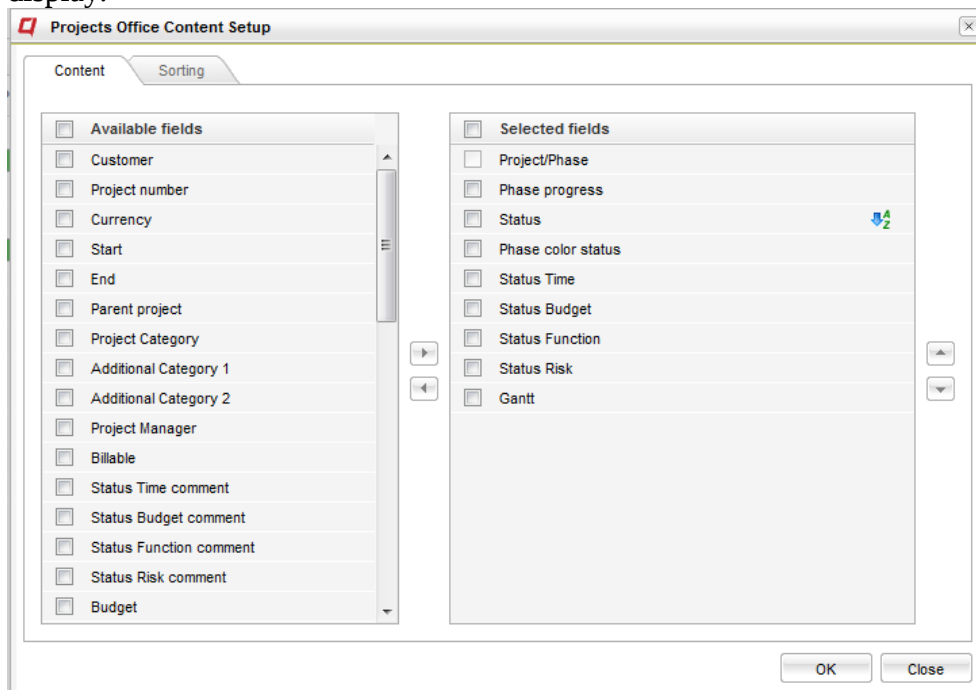
MS Project Resource	User	Global Resource	Project Resource	No import
FA		Global Resource TR3		☐
PK			Test resource	☐
YR	Adolfsson, Fredrik (fredi)			☐

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.

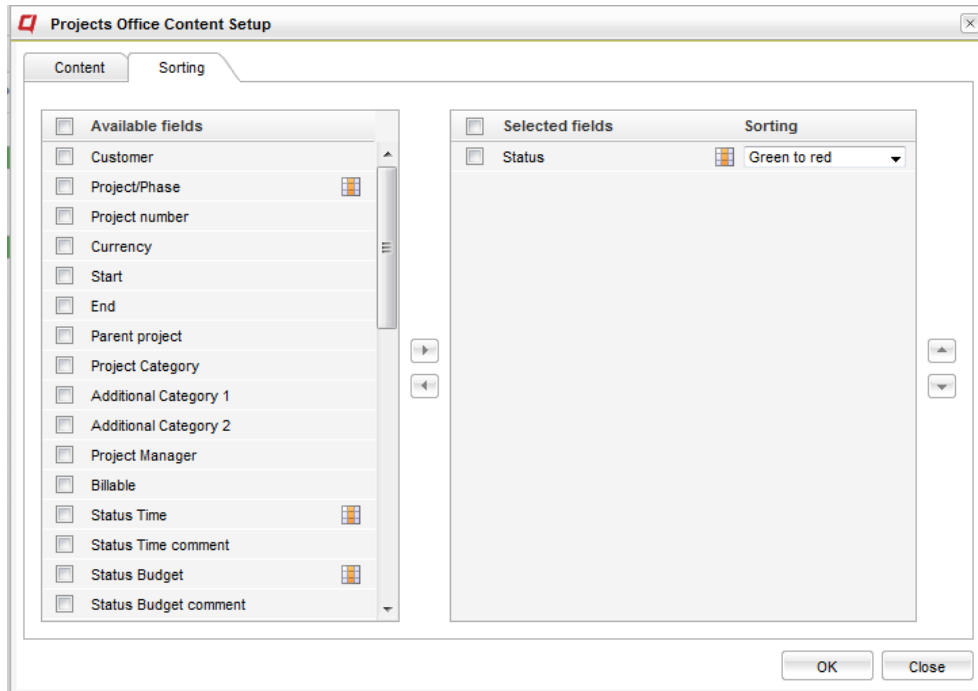


The 'Projects Office Content Setup' dialog box has two tabs: 'Content' and 'Sorting'. The 'Content' tab is active, showing a list of 'Available fields' on the left and a list of 'Selected fields' on the right. The 'Available fields' list includes Customer, Project number, Currency, Start, End, Parent project, Project Category, Additional Category 1, Additional Category 2, Project Manager, Billable, Status Time comment, Status Budget comment, Status Function comment, Status Risk comment, and Budget. The 'Selected fields' list includes Project/Phase, Phase progress, Status, Phase color status, Status Time, Status Budget, Status Function, Status Risk, and Gantt. There are arrows between the two lists to move items. At the bottom right, there are 'OK' and 'Close' buttons.

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.

Customer Name * Internal	Project Name * Demo Project	Status Not Started
Currency * EUR Euro	Default Rate 0.00	Default Cost 0.00
Project start date * 15/02/2012	Project End Date	Parent Project
Project Category * Standard Project	Additional Category 1 Standard	Additional Category 2 Standard
Project Manager	Progress Bar Based On % Complete	Project Office Gantt Bar Color
☒ Enable in Project Office	☐ Enable Project Folder	☐ Enable in My View
☐ Project Template	☐ Billable	☒ Enabled
Custom Fields		
Organization Finance	Priority * not set	Country (All)

Project Status

				Published	Comments
Time	☒	☐	☐	☒	
Budget	☒	☐	☐	☒	
Function	☒	☐	☐	☒	
Risk	☒	☐	☐	☒	
UserDefined	☒	☐	☐	☒	

Budget Spent Forecast

Earned Value

PV	AC	EV	BAC	CV	SV
40,000	12,000	11,429	40,000	-571	-28,571
CPI	SPI	EAC	ETC	VAC	
0.95	0.29	42,000	30,000	-2,000	

Comments

Internal Comments

Status Date

Status reporting reminder activated ☐

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 calculate 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 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.

☐ Portfolio		
No records to display		
Delete New		
☐ Department/Organization Name Description		
No records to display		
Delete New		
Additional Project Information		
Description		
Customer Contact	Our contact	Reference
☐ Project Role Resource Name		
No records to display		
Delete New		
☒ Related Document Project Office Enabled		
No records to display		
Delete New		

Additional project information

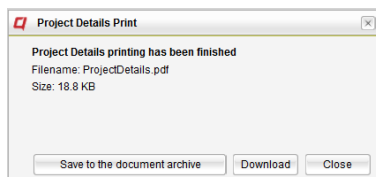
Project detail print

Demo Project

Details	Resources	Planning	Activity Details	Resource Allocation	Budget and control
Customer Name *	Project Name *	Status			
Internal	Demo Project	Not Started			
Currency *	Default Rate	Default Cost			
EUR Euro	0.00	0.00			
Project start date *	Project End Date	Parent Project			
15/02/2012	30/11/2014				
Project Categories *	Additional Category 1	Additional Category 2			
Standard Project	Standard	Standard			
Project Manager	Progress Bar Based On				
	% Complete				
☒ Enable in Project Office	☐ Enable Project Folder	☐ Enable In My View			
☐ Project Template	☐ Billable	☒ Enabled			
Custom Fields					
Project Status					
Additional Project Information					

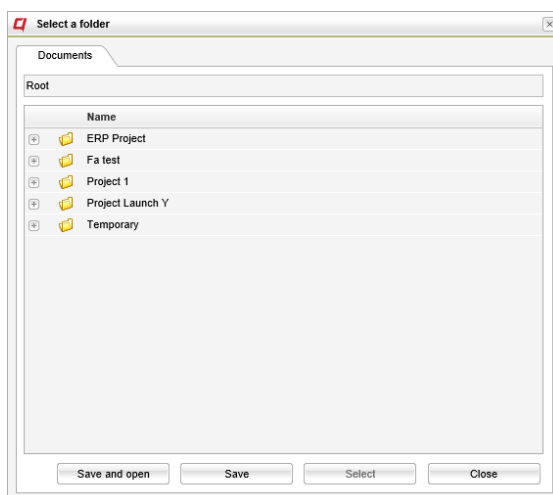
Project Office Project List Save Cancel Print

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.

Resource Type
People
Name

☐ Available resources
☐ Rogach, Yury (yuro@cliklum.com)

Assigned resources	Default Rate	Cost	Billable	Booking Status	Enabled
☐ Adolfsson, Fredrik (fredrik.adolfsson@webforum.com)	0.00	0.00	☐	▲	☒

Resources

Resource Type
Project Resource

Search
Keyword

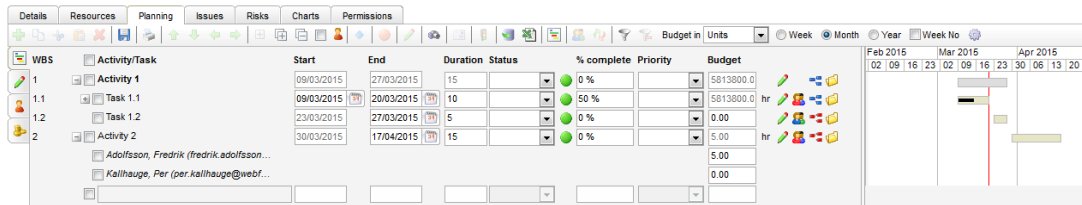
Enabled
All

☐	Name	Description
☐	Large tractor disabled	
☐	Large tractor enabled	
☐	Lightning equipment disab	Lightning equipment description
☐	x1	
☐	x2	
☐	x3	
☐	x4	

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 a) Inserts new empty row above the selected row 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 a) Copies selected rows. b) Single activities or structures can be copied
	3. Cut button a) Cuts selected rows b) Single activities or structures or combinations can be cut
	4. Paste button

	a) Pastes previously copied/cut rows or structures b) Paste as a definition always takes place before current/selected row. c) Rows will be pasted according to the following rules: 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 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 c. If selected row is first activity → paste on highest indentation level. 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. e) Pasted structures will remain unchanged. f) Recursive paste is allowed. This means that cut/copied rows/structures can be pasted several times. 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 a) Deletes selected rows. b) Select one or several rows, using row check box. c) If a structure level is selected, all underlying sub-structures and activities are deleted. A warning message is displayed. d) If selected activity is referenced from another table, delete is not allowed. 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 a) Expands all nodes in current branch 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 Expands all nodes
	14. Collapse all button 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 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 Export the currently displayed rows to excel
	25. Refresh GANTT button (Planning tab only) Refreshes the GANTT scheme with changes to the activity tree
	26. Multi resource assignment a) Function used to assign one or several resources to several activities in one step b) A number of activities could be selected by ticking the row check box. c) Resource assignment screen is displayed. d) Resources that are assigned to all selected activities are displayed on the right hand side. e) Resources that are not assigned to all selected activities are displayed on the left hand side.
	27. Replace resources 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 a) Inserts new empty row above the selected row 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.

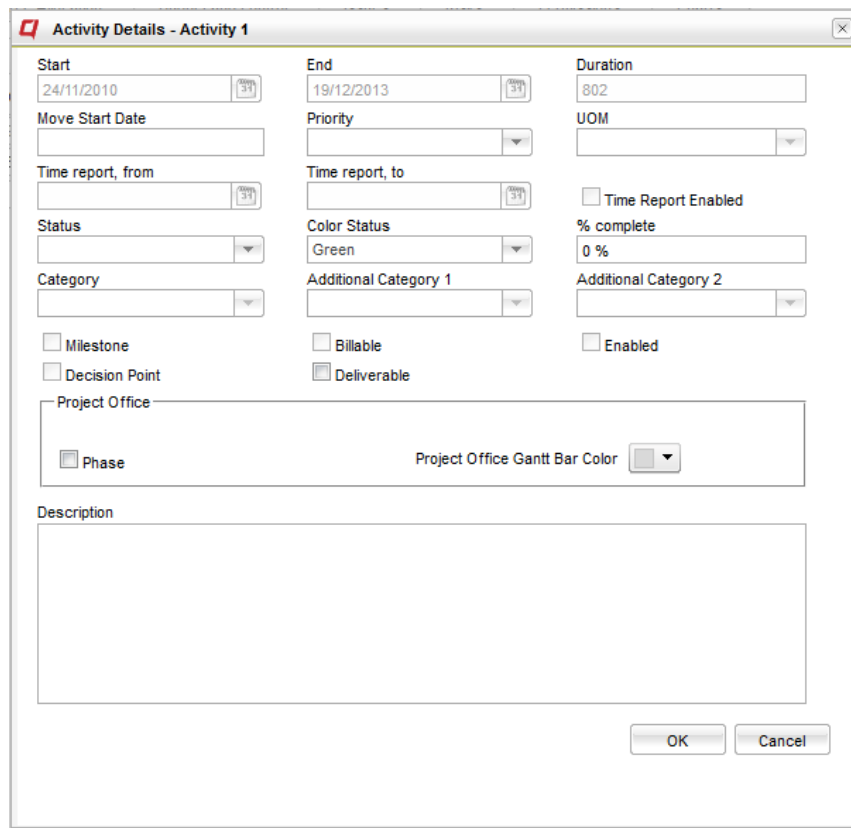
By double clicking on an activity, that field becomes active and it is possible to change the activity name.

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.



The dialog box titled "Activity Details - Activity 1" contains the following fields and controls:

- Start:** Date field with value 24/11/2010 and a calendar icon.
- End:** Date field with value 19/12/2013 and a calendar icon.
- Duration:** Text field with value 802.
- Move Start Date:** Empty text field.
- Priority:** Dropdown menu.
- UOM:** Dropdown menu.
- Time report, from:** Date field with a calendar icon.
- Time report, to:** Date field with a calendar icon.
- Status:** Dropdown menu.
- Color Status:** Dropdown menu with value Green.
- % complete:** Text field with value 0 %.
- Category:** Dropdown menu.
- Additional Category 1:** Dropdown menu.
- Additional Category 2:** Dropdown menu.
- Time Report Enabled:** Checkbox, currently unchecked.
- Milestone:** Checkbox, currently unchecked.
- Decision Point:** Checkbox, currently unchecked.
- Billable:** Checkbox, currently unchecked.
- Deliverable:** Checkbox, currently checked.
- Enabled:** Checkbox, currently unchecked.
- Project Office:** Section containing:
 - Phase:** Checkbox, currently unchecked.
 - Project Office Gantt Bar Color:** Color selection dropdown.
- Description:** Large text area for activity description.
- Buttons:** OK and Cancel buttons at the bottom right.

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 marked 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.

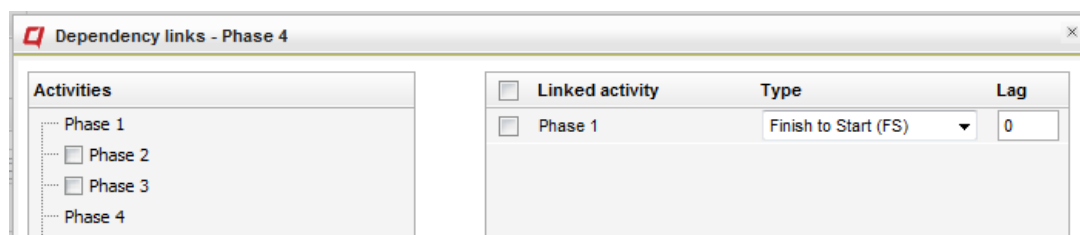
Resource assignment



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

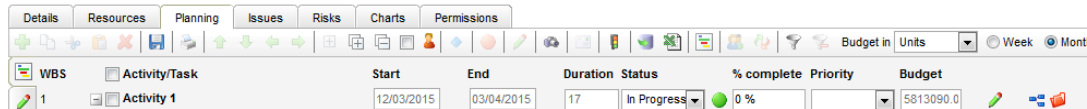
FF – The dependent activity will finish when the linked activity is finished

SF – The dependent activity will finish when the linked activity starts

SS – The dependent activity will start when the linked activity starts

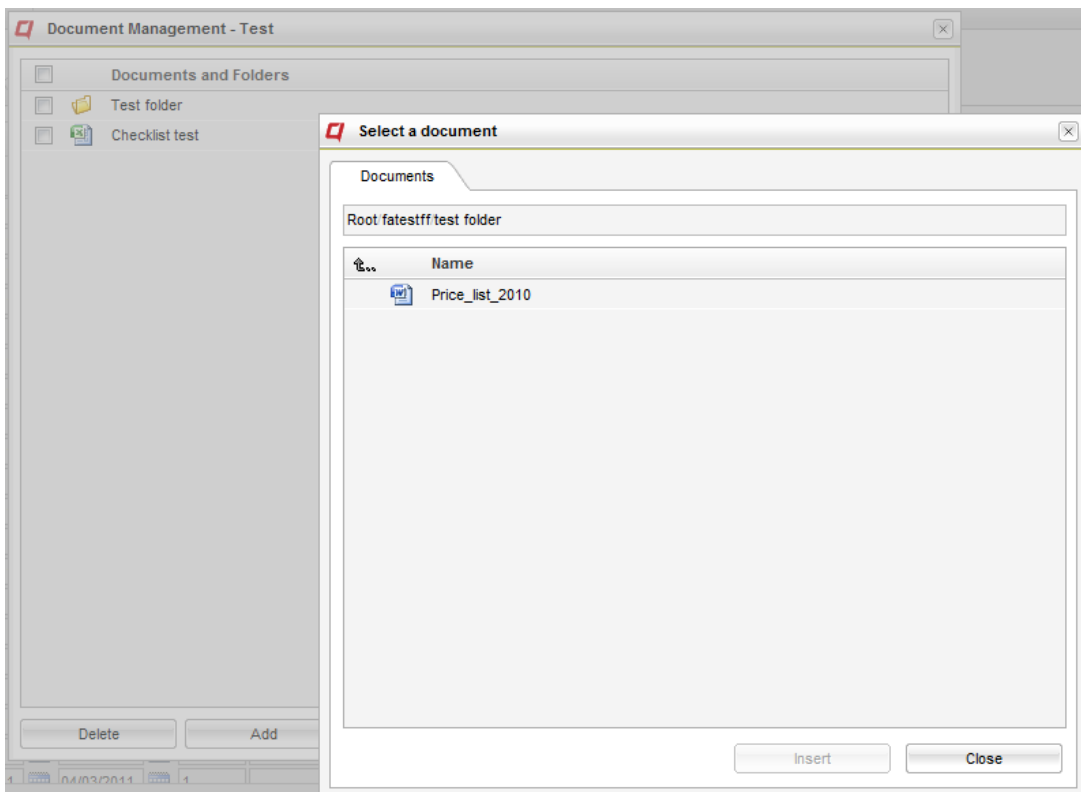
The lag describes if the activity should start/finish directly in connection to the start/finish of the linked activity, or if there should be a gap. The lag unit is days.

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.

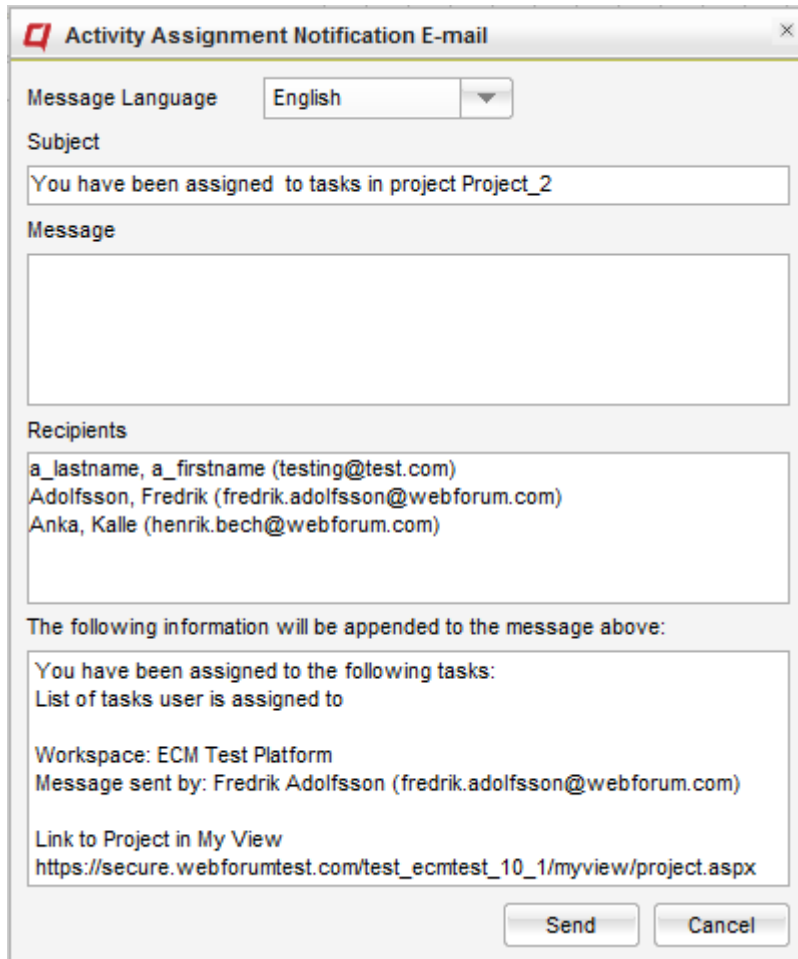


Select folders/documents to link

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

Message Language: English

Subject: You have been assigned to tasks in project Project_2

Message:

Recipients:
a_lastname, a_firstname (testing@test.com)
Adolfsson, Fredrik (fredrik.adolfsson@webforum.com)
Anka, Kalle (henrik.bech@webforum.com)

The following information will be appended to the message above:

You have been assigned to the following tasks:
List of tasks user is assigned to

Workspace: ECM Test Platform
Message sent by: Fredrik Adolfsson (fredrik.adolfsson@webforum.com)

Link to Project in My View
https://secure.webforumtest.com/test_ecmtest_10_1/myview/project.aspx

Send Cancel

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/Activity	Start	End	Status	% Complete	Budget	Spent	ETC	UOM
Changes Since My Last Login	☐ Test project XXX(Test Customer)								
Project activities	Test act 3	10/03/2010	24/03/2010		0 %	10.00	0.00	10.00	hr
Status Reports	☐ Test Project YYY(Test Customer)								
	test act 2	09/03/2010	24/03/2010		0 %	10.00	0.00	10.00	hr

My View Project Activities

Status Reporting

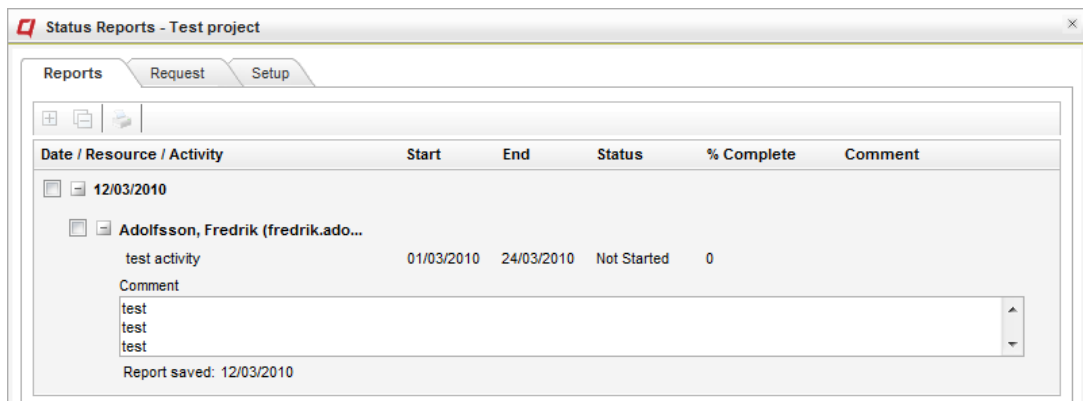
By clicking the status reporting icon, , it is possible to request and look at status reports related to the project. If a status report is requested, the person responsible for the activity will receive an e-mail where he/she is asked to fill in a status report in “My View”. The e-mail will contain 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 Reports - Test project

Reports Request **Setup**

☒ **Status Reporting Function Activated**
 When the Status Reporting Function is activated, a request for status report will, on a periodical basis, be sent to all resources in the project who are responsible for at least one ongoing task, i.e. the start date has passed and the task is not yet finished.

Request Recurrence Pattern

☒ Weekly on Friday
☐ Monthly ☐ Day 1 of every month
☐ The Last Friday of every month

Message
 Don't forget to report status.....

Status report setup

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

Project / Date / Activity	Start	End	Status	% Complete	Comment
Test project (FA test customer)					
Test project XXX (Test Customer)					
12/03/2010					
Testact 1	10/03/2010	24/03/2010	Not Started	0 %	
Comment					
12/03/2010					
Project_1 (Testers Inc.)					

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.

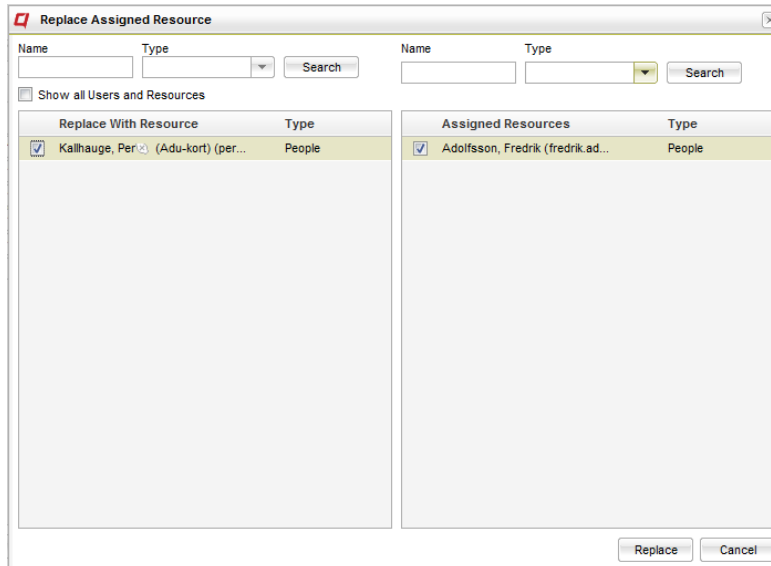
Activity Details - Pre-Study

Start 28/03/2012	End 24/04/2012	Duration 20
Move Start Date []	Priority []	UOM []
Time report, from []	Time report, to []	☐ Time Report Enabled
Status In Progress	Color Status Green	% complete 0 %
Category []	Additional Category 1 []	Additional Category 2 []
☐ Milestone	☐ Billable	☐ Enabled
☒ Deliverable		
Project Office		
☒ Phase		
Project Office Gantt Bar Color []		
Description []		
[OK] [Cancel]		

Activity Mass Update

Replace resources

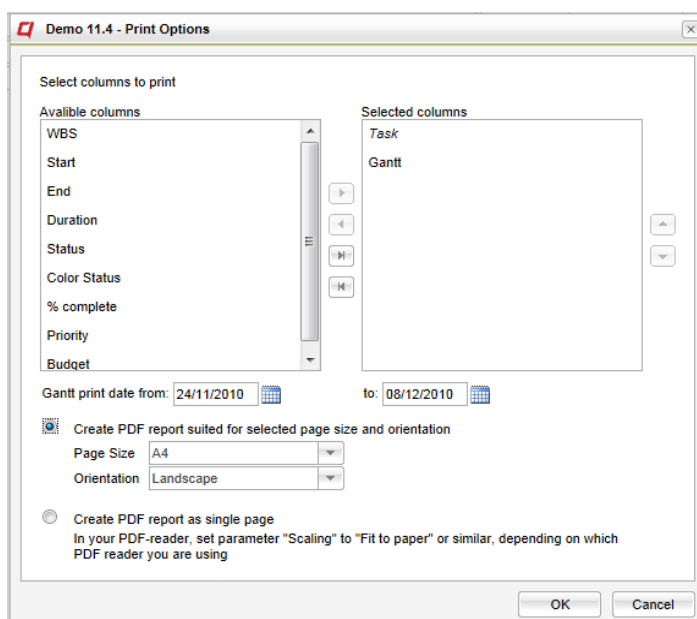
With the replace resources function it is possible to change who is assigned to an activity. Perhaps Person 1 was assigned to Activity 1 and 2, but then he/she must work with other projects. With this function, Person 1 is replaced by Person 2 for all the selected activities. Please note that it is not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

The 'Filter' dialog box has a title bar with a red square icon and the word 'Filter'. It contains two tabs: 'General' (selected) and 'Resources'. A 'Clear Filter' button with a red 'X' icon is in the top right. The 'General' tab contains several filter criteria:

- Status:** A dropdown menu.
- Color Status:** A dropdown menu.
- Priority:** A dropdown menu.
- UOM:** A dropdown menu.
- Milestone:** A dropdown menu.
- Decision Point:** A dropdown menu.
- Start:** A date field with a calendar icon.
- End:** A date field with a calendar icon.
- % complete:** A range field with two input boxes and a minus sign.
- Activity Categories & Custom Fields:** A section containing:
 - Category:** A dropdown menu.
 - Additional Category 1:** A dropdown menu.
 - Additional Category 2:** A dropdown menu.
- Resource Categories:** A section containing:
 - Category:** A dropdown menu.
 - Additional Resource Category 1:** A dropdown menu.
 - Additional Resource Category 2:** A dropdown menu.
- Phase:** A dropdown menu.
- Deliverable:** A dropdown menu.
- Billable:** A dropdown menu.
- Enabled:** A dropdown menu.
- Time Report Enabled:** A dropdown menu.

At the bottom right are 'OK' and 'Cancel' buttons.

Filter General

The 'Filter' dialog box has a title bar with a red square icon and the word 'Filter'. It contains two tabs: 'General' and 'Resources' (selected). A 'Clear Filter' button with a red 'X' icon is in the top right. The 'Resources' tab contains:

- Name:** A text input field with the value 'read' and a 'Search' button.
- Not selected:** A list box containing one item: 'Readerman, Moshe (wa_reader@webfo...)'.
- Selected:** A list box containing two items: 'Adolfsson, Fredrik (fredrik.adolf...)' and 'Anderson, Joe (joe.anderson@somec...)'.
- Between the two list boxes are two arrow buttons: a right-pointing arrow and a left-pointing arrow.

At the bottom right are 'OK' and 'Cancel' buttons.

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.

Display Budget as FTE 

% complete	Priority	Budget
100 %		
20 %		
0 %		
0 %		0.00
0 %		
0 %		

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.

☐ Week ☒ Month ☐ Year ☐ Week No 

3 Jun 2013 Jul 2013 Aug 2013

13 20 27 03 10 17 24 01 08 15 22 29 05

Gantt setup

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

 **Manual Eng - Gantt setup** 

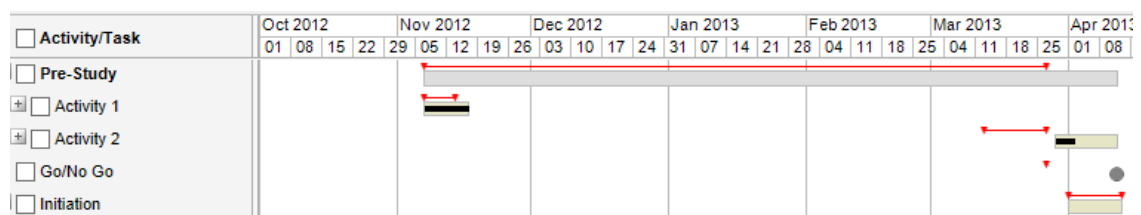
☐ Show baseline in Gantt

Baseline version 

☒ Show Critical Path

OK Close

Gantt setup pop up window

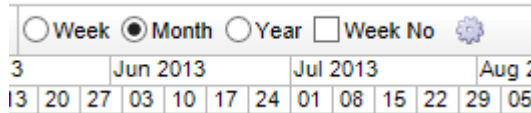


Baseline displayed in Gantt

Critical Path in Gantt

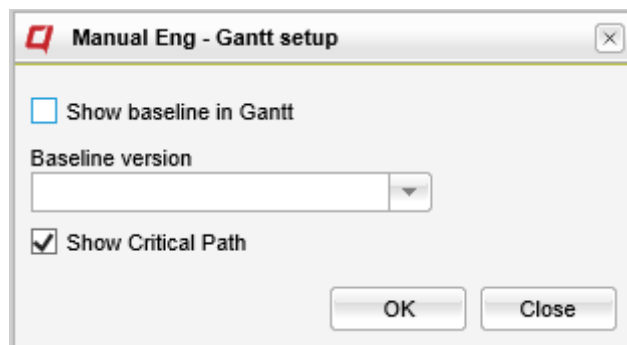
The critical path is defined as those activities that affect the end date of a project. The critical path will consist of those activities with the same end date as the end date of the last activity plus activities which those activities are dependent on.

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.

☐ Activity/Task	Start	End	Duration	Status	% complete	Priority	Budget		Jan 2012	Feb 2012
☐ act 1	01/02/2012	01/02/2012	1		0 %			hr		
☐ act 2	17/02/2012	17/02/2012	1		0 %			hr		
☐ act 3	07/02/2012	07/02/2012	1		0 %			hr		
☐ act 4	16/02/2012	20/02/2012	3		0 %			hr		
☐										

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.

	Start	End	Time report, from	Time report, to UOM	Activity Categories	Additional Category 1	Additional Category 2	Billable	Enabled	Rate
Activity 1	12/03/2015	03/04/2015								
Task 1.1	16/03/2015	27/03/2015		hr	Standard			☒	☒	
Task 1.2	30/03/2015	03/04/2015	30/03/2015	hr	Standard	Standard		☒	☒	
Task 2.1	12/03/2015	25/03/2015	12/03/2015	hr	Standard	Standard	Standard	☐	☒	
Activity 2	06/04/2015	24/04/2015		hr	Standard			☐	☒	
Adolfsson, Fredrik (fredrik.adolfsson...)			02/04/2015	30/04/2015				☒	☒	0.00
Kallhaug, Per (per.kallhaug@webf...)								☒	☒	0.00

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% of 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.

Task	Start	End	Duration	Budget
Activity 1	12/03/2015	03/04/2015	17	5813090.0
Task 1.1	16/03/2015	27/03/2015	10	5813090.0
Task 1.2	30/03/2015	03/04/2015	5	
Task 2.1	12/03/2015	25/03/2015	10	
Activity 2	06/04/2015	24/04/2015	15	123.33
Adolfsson, Fredrik (fredrik.adolfsson@webforum.com)			30.00	
Kallhaug, Per (per.kallhaug@webforum.com)			93.33	

Resource	Budget	Actual	ETC
Adolfsson, Fredrik (fredrik.adolfsson@webforum.com)	0.00	0.0	0.0
Adolfsson, Fredrik (fredrik.adolfsson@webforum.com)	120.00	45.0	45.0
Adolfsson, K. Fredrik (fredrik.adolfsson@educera.com)	5000000.0	---	---
Arvidsson, Johan (johan.arvidsson@webforum.com)	400000.00	---	---
Kallhaug, Per (per.kallhaug@webforum.com)	413093.33	26.7	40.0

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.

Task	Start	End	Duration	Budget
Activity 1	12/03/2015	03/04/2015	17	5813090.0
Task 1.1	16/03/2015	27/03/2015	10	180.00
Task 1.2	30/03/2015	03/04/2015	5	
Task 2.1	12/03/2015	25/03/2015	10	
Activity 2	06/04/2015	24/04/2015	15	150.00
Adolfsson, Fredrik (fredrik.adolfsson@webforum.com)			30.00	
Kallhaug, Per (per.kallhaug@webforum.com)			150.00	

Resource	Budget	Actual	ETC
Adolfsson, Fredrik (fredrik.adolfsson@webforum.com)	0.00	0.0	0.0
Adolfsson, Fredrik (fredrik.adolfsson@webforum.com)	120.00	45.0	45.0
Adolfsson, K. Fredrik (fredrik.adolfsson@educera.com)	5000000.0	---	---
Arvidsson, Johan (johan.arvidsson@webforum.com)	400000.00	---	---
Kallhaug, Per (per.kallhaug@webforum.com)	413093.33	26.7	40.0

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.

Task	Start	End	Duration	Budget
Adolfsson, K. Fredrik (fredrik.adolfsson@educera.com)			5128.00	
Adolfsson, Fredrik (fredrik.adolfsson@webforum.com)			3076.80	
Adolfsson, Fredrik (fredrik.adolfsson@webforum.com)			1794.80	
Arvidsson, Johan (johan.arvidsson@webforum.com)			2051.20	
Kallhaug, Per (per.kallhaug@webforum.com)			4615.20	

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.

Task	Start	End	Baseline	Current Budget	Status	% complete	% Expend	Spent	ETC	Forecast	Baseline Variance	Budget Variance
Activity 1	12/03/2015	03/04/2015	5813800.00	5813090.00	In Progress	0 %	0.00	2.00	5813000.00	5813002.00	-798.00	-88.00
Task 1.1	16/03/2015	27/03/2015	5813800.00	5813090.00	hr	50 %	0.00	2.00	5813000.00	5813002.00	-798.00	-88.00
Task 1.2	30/03/2015	03/04/2015	0.00	0.00	hr	0 %	0.00	0.00	0.00	0.00	0.00	0.00
Task 2.1	12/03/2015	25/03/2015	0.00	0.00	hr	0 %	0.00	0.00	0.00	0.00	0.00	0.00
Activity 2	06/04/2015	24/04/2015	5.00	180.00	hr	0 %	62.30	38.00	23.00	61.00	55.00	-119.00
Adolfsson, Fredrik (fredrik.adolfsson@webforum.com)			5.00	30.00				32.00	23.00	55.00	25.00	
Kallhaug, Per (per.kallhaug@webforum.com)			0.00	150.00				6.00	0.00	6.00	-144.00	
Project totals			5813805.00	5813270.00			0.00	40.00	5813023.00	5813063.00	-742.00	-207.00

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 wish, 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.

Name	Description	Included in Reporting	Create Date
Baseline 1		☐	01/06/2010
Baseline 2		☒	01/06/2010

Baseline Management

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

% Complete: The manual % complete set by the project manager or administrator

% Spent: $\text{time reported} / (\text{time reported} + \text{Estimate To Complete, ETC}) * 100$

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

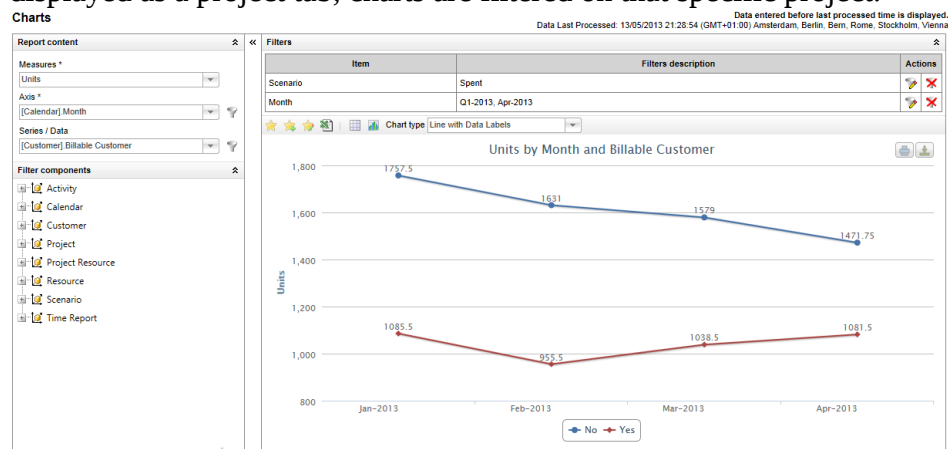
This tab is further explained under “Issues”

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.

☐	Group / User	Full	Create	Read	Update	Delete
☐	All users	☐	☐	☐	☐	☐
☐	Webforum Personnel	☐	☐	☒	☐	☐
☐	Adolfsson, Fredrik (fredrik.adolfsson@webforum.com)	☒	☐	☒	☒	☒

The Permissions tab

”Full” - full access to all tabs, including the Permissions tab.

”Create” - not used (in order to create new projects – see group rights in admin)

”Read” - gives access to all project tabs except Permissions. No changes can be made.

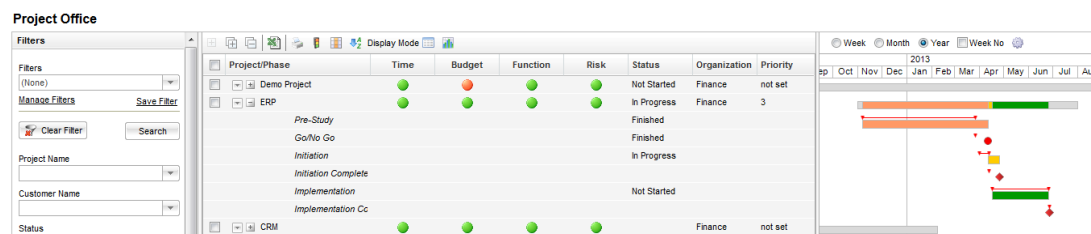
”Update” - access to all tabs except Permissions, possibility to change data.

”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.

Demo Project

Customer Name Internal	Status Not Started	Parent Project
Start Date 15/02/2012	End Date 30/11/2014	Currency EUR Euro
Project Categories Standard Project	Additional Category 1 Standard	Additional Category 2 Standard
Project Manager		

Custom Fields		
Organization Finance	Priority not set	Country

Project Status		
Time		
Budget		
No approval yet		
Function		
Risk		
User defined status		
Budget 0	Spent 0	Forecast 0
Comments		
Status Date		

Project Description

Project Role	Resource Name
No records to display	

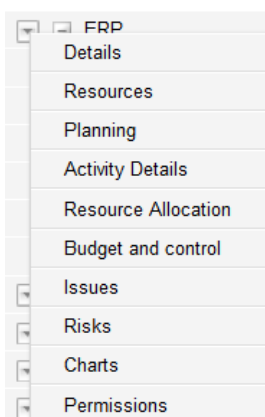
Portfolio
No records to display

Phase	Start	End	Status
No records to display			

Department/Organization Name	Description
No records to display	

Related Document
No records to display

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

Filters Fields

Favorite filters
(None)

[Manage Filters](#) [Save Filter](#)

Clear Filter

Project Name

Customer Name

Status

Project Category

Additional Category 1

Additional Category 2

Portfolio

Project Manager

Custom Fields

Organization

Priority

Country (All)

Project/Phase

☒ Billing system

☒ CRM

☒ Demo Project

☒ ERP

Pre-Study

Go/No Go

Initiation

Initiation Complete

Implementation

Implementation Complete

☒ Product Launch X

☒ Project Launch Y

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.

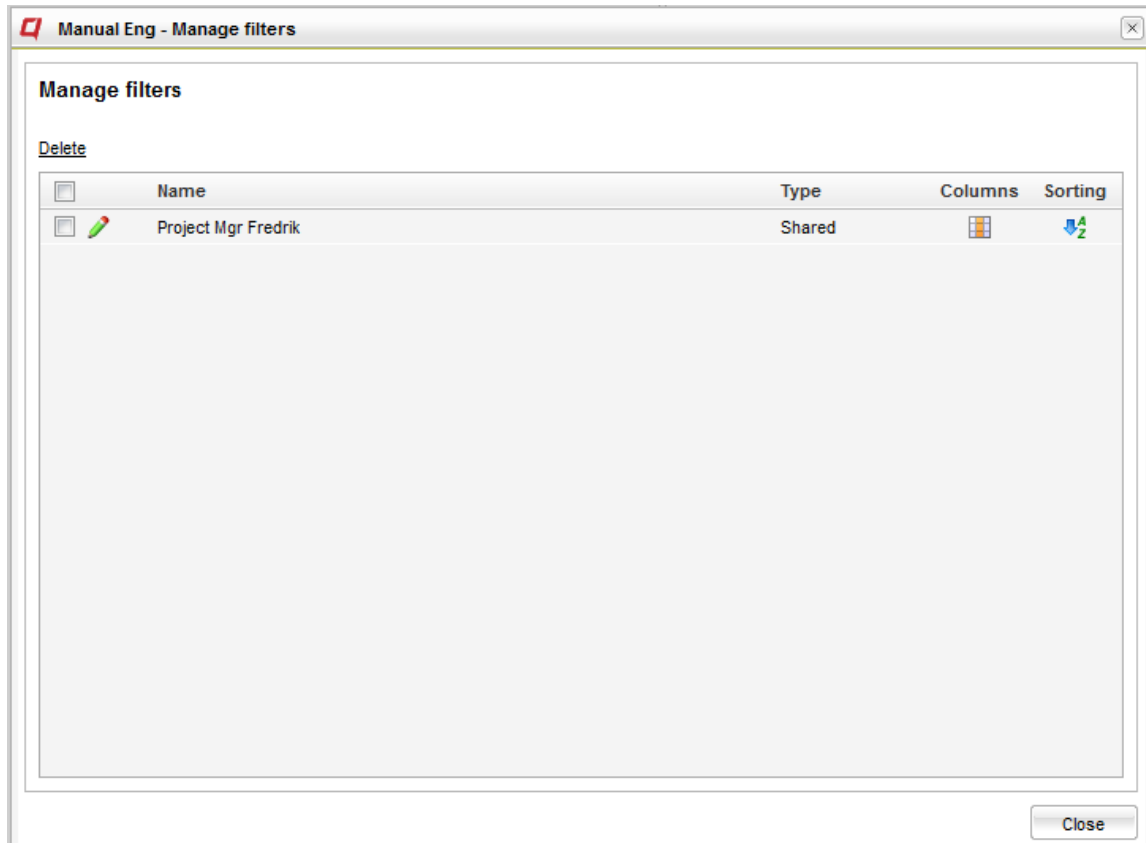
Manual Eng - Save filter

Name

☐ Shared 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

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 .

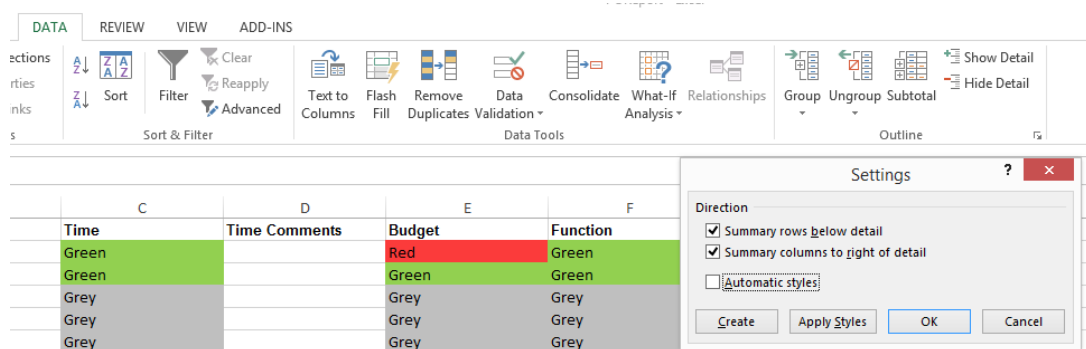
All fields, except the Phase progress and GANTT scheme will be exported.

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.

1	2	A	B
	1	Project/Phase	Status
	2	Demo Project	Not Started
	4	ERP	In Progress
	5	Pre-Study	Finished
	6	Go/No Go	Finished
	7	Initiation	In Progress
	8	Initiation Complete	
	9	Implementation	Not Started
	10	Implementation Complete	
	11	CRM	
	21	Billing system	

Hierarchies in excel.

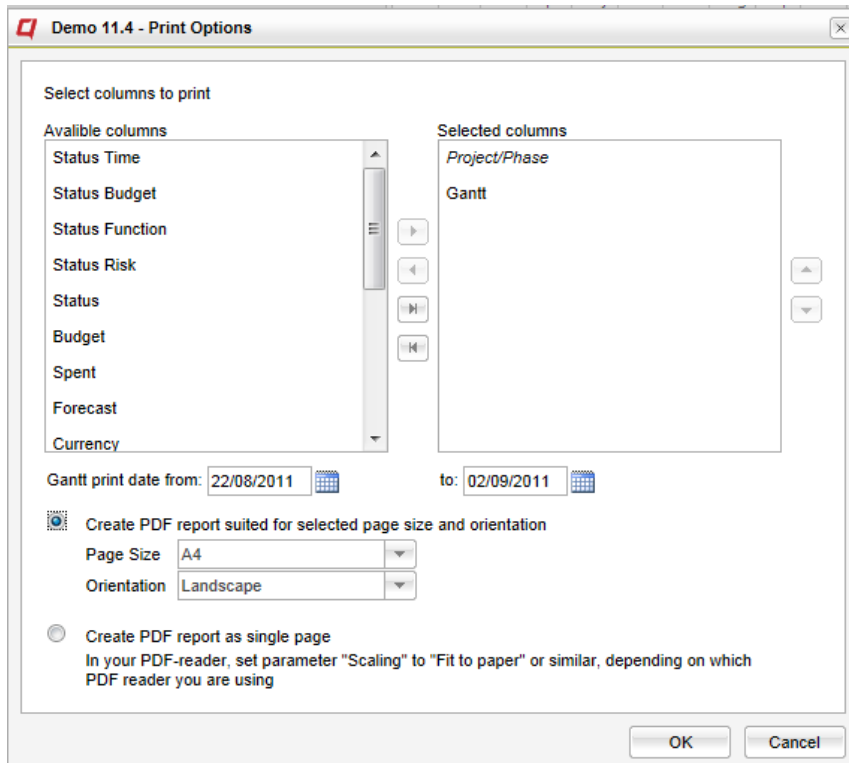
If you want to have the top level plus sign above the subproject/phase rows, uncheck “Summary rows below detail” in the outline menu that is reach from the data tab. The exact location of this choice depends on the version of excel that you are running.



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.

ECM Test Platform - Status Reports

☒ **Automated Status Reporting Function Activated**
When the Status Reporting Function is activated, a request for status report will be send to the project managers for the selected project as long as the start date has passed and the project is not yet finished.

Project Manager Status Reminder Option

Selected Projects

Request Recurrence Pattern

☒ **Weekly** on

☐ **Monthly** ☐ 1. Day

☐ **The**

Message

Please report status for the last week no later than 16:00.

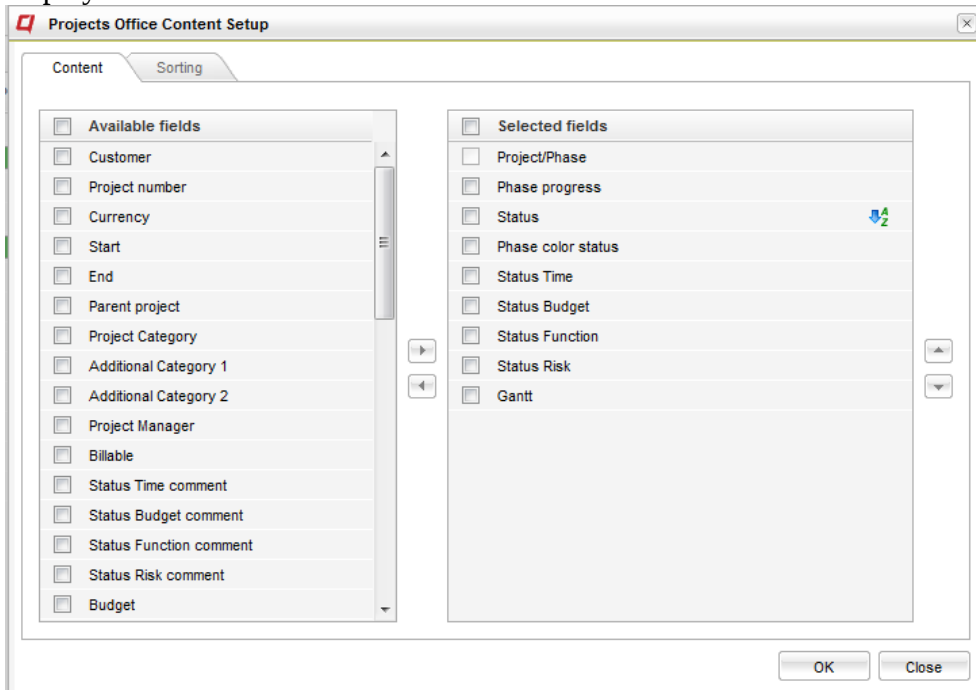
/PMO

Activated 07/02/2012 by Fredrik Adolfsson (fredrik.adolfsson@webforum.com)

Status reporting reminder set up

Column Set up

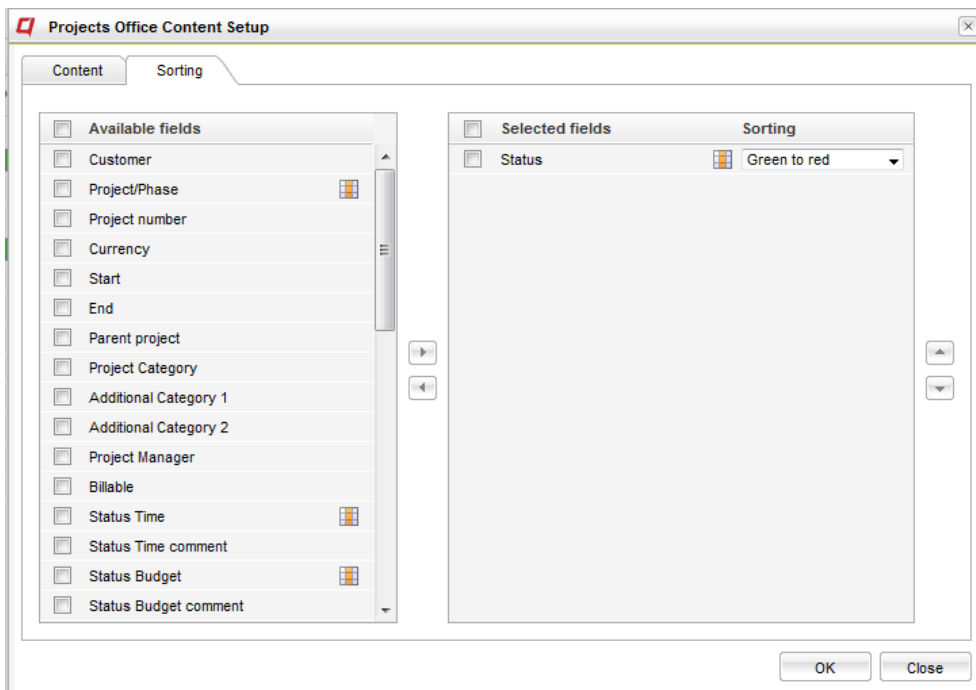
Press the column set up icon  on the toolbar in order to choose which columns to display.



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.



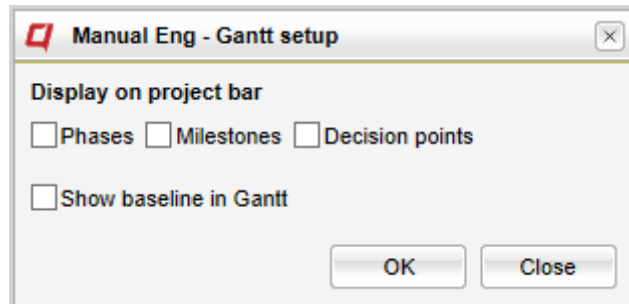
Sort order set up

Gantt Set up

There are menu choices for deciding which period to display in the Gantt chart. It is also possible to show week numbers.

☐ Week ☐ Month ☒ Year ☐ Week No 

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.

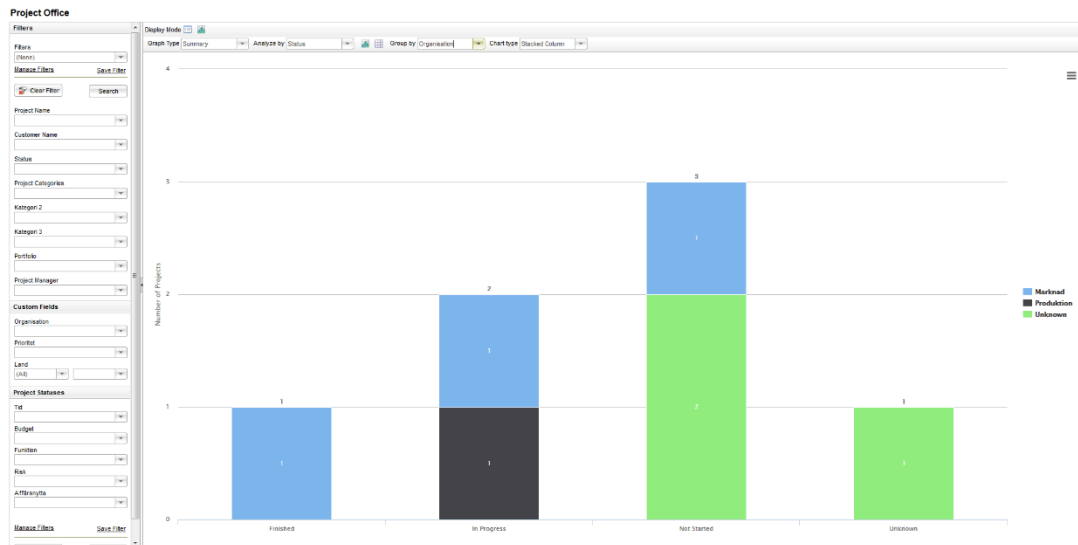
Project Office



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 bubble size. You can also optionally group on one additional parameter.



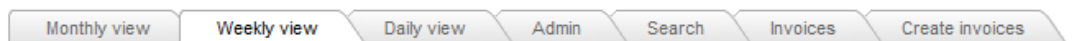
Bubble chart

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



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.

Monthly view							
December 2010 - June 2011							
UOM (All) Hide empty rows							
Project / Activity	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11
[-] Fa view test copy (Customer Test)							
[-] Fredrik test behörigheter 3 (Customer Test)							
test	un.						14.00
[-] GRA RA Export (Customer Test)							
Activity 1	hr.					5.00	3.00
[-] Test behörigheter 4 (Customer Test)							
[-] Testprojekt 2011-03 (Customer Test)							
[-] ERP Project (Testers Inc.)							
activity 1	hr.						
Sum	0.00	0.00	0.00	0.00	0.00	5.00	26.00

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

Monthly view Weekly view Daily view Admin

Week 24, 13 Jun 2011 - 19 Jun 2011 UOM hr. Hide empty rows Save Cancel

Project / Activity	Mon 13	Tue 14	Wed 15	Thu 16	Fri 17	Sat 18	Sun 19	Sum	ETC
GRA RA Export (Customer Test)									
Activity 1	hr. 4.00	2.00						6.00	0.00
Testprojekt 2011-03 (Customer Test)									
ERP Project (Testers Inc.)									
Sum	4.00	2.00	0.00	0.00	0.00	0.00	0.00	6.00	

Report Completed All ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Description Internal comment

Save Cancel

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 activity. 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.

Monthly view Weekly view **Daily view** Admin

Thu 16 May 2013 UOM (All) ☐ Hide empty rows Save Cancel

Project / Activity	Thu 16	ETC	Description	Internal comment
☐ Demo Project (Internal)				
☐ Activity 1				
Activity 2	hr 4.00	29.00	this is a description	
☐ Issues				
☐ Demo Project Sep 2012 (Internal)				
☐ ERP (Internal)				
☐ Pre-Study				
Activity 1	hr	97.00		
Implementation	hr	20.00		
Sum		0.00		
Report Completed	☐			

Save Cancel

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.

Monthly view Weekly view Daily view **Admin**

Keyword Approver For Search Advanced

Week 7, 13 Feb 2012 - 19 Feb 2012 UOM (All) ☐ Hide empty rows Save Cancel

Resource / Project / Activity	Mon 13	Tue 14	Wed 15	Thu 16	Fri 17	Sat 18	Sun 19	Sum	ETC	Approved
☐ A (Adu), Fredrik (fredrik.adolfs...)										☐
☐ Adolfsson, Fredrik (fredrik.adolf...)	8.00	6.00	4.00	0.00	0.00			18.00		
Report completed	☒	☐	☐	☐	☐	☐	☐			
Report approved	☒	☐	☐	☐	☐	☐	☐			☐
☐ Construction Project 1 (Internal)										
☐ Activity 1										
Activity 1.1	hr 8.00	6.00	4.00					18.00	5.00	
Activity 2	pcs								0.00	
☐ Construction Project 2 (Internal)										
☐ Demo Project (Internal)										
☐ Project 3 (Internal)										
☐ Ilis, Peter (peter.ilis@aducera.c...)										☐
Approve All	☐	☐	☐	☐	☐	☐	☐			☐

Description Internal comment

Save Cancel

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.

Search time reports

Search											
Last name		First name		Customer Name		Project Name					
Report date, from		Report date, to		Invoice date, from		Invoice date, to					
Resource category		Invoice number		Activity		Invoiced		Billable			
Search		Export 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	6.00hr	0.00SEK	1036	☒			Employee
Olinyk, Vol...	Webforum	Time Re...	Build a...	20/11/2006	1.00hr	0.00SEK	1036	☒			Employee
Olinyk, Vol...	Webforum	Time Re...	Build a...	21/11/2006	4.00hr	0.00SEK	1036	☒			Employee
Olinyk, Vol...	Webforum	Time Re...	Build a...	22/11/2006	8.00hr	0.00SEK	1036	☒			Employee
Karlsson, Jo...	Webforum	Time Re...	Technic...	23/11/2006	4.00hr	0.00SEK	1036	☒			Employee
Karlsson, Jo...	Webforum	Time Re...	Technic...	04/12/2006	6.00hr	0.00SEK	1036	☒			Employee
Olinyk, Vol...	Webforum	Time Re...	Build a...	04/12/2006	2.00hr	0.00SEK	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.

Invoices

Search					Advanced >>
Keyword		Preliminary		Search	

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

Search

Simple >>

Customer Name

Project Name

Preliminary

Invoice date, from

Invoice date, to

Invoice number

Search



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 no	Customer
1037	Brainpool AB
View invoice	Webforum
Approve	Brainpool AB
Cancel	AFF
	AFF

Invoice list

View and approve invoices

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

Printed invoice - Windows Internet Explorer

http://212.214.191.151/test_tr_2

Google

Go

Bookmarks

446 blocked

Settings

Printed invoice

Customer

Brainpool AB

Project

Test 4

Resource

Anders Andersson

Date

Activity

Units

Price

Description

2007-06-18

Task 1.1.1

5,00 hr

300,00

2007-06-18

Task 1.1.1

5,00 hr

300,00

2007-06-19

Task 1.1.1

2,00 hr

300,00

Test

Units

Amount

12,00 hr

3600,00

Grand total

ADP 3600,00

Print this page

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.

Invoices

Search

Customer Name Project Name

Report date, from Report date, to

☐ Customer	Project	Report date, from	Report date, to	Preliminary
☐ AFF	AFF Webplots	21/05/2007	01/06/2007	☒
☐ Schneider & Co	Schneider & Co We...	16/05/2007	16/05/2007	☒

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.



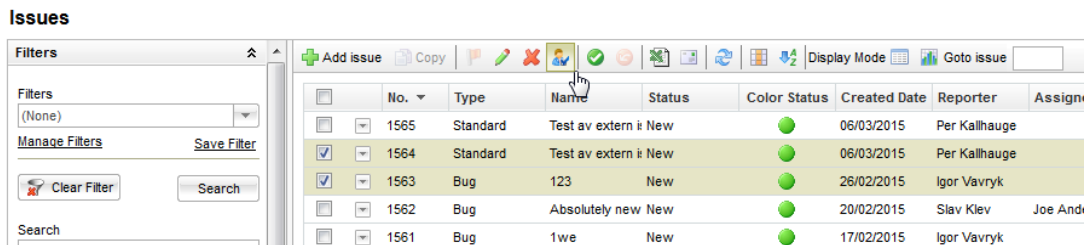
Please observe that invoicing is always performed on a project level. Approved invoices cannot be deleted, which means that no more time can be reported on the corresponding activities and dates. Issues can currently not be invoiced.

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.

Use this e-mail address to send issues to the project pmis61bb9f60@inbox.webforumtest.com 1 records (1 pages)

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.

Allow workspace level issue import via e-mail ☐

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.

Issues

Filters

Filters

(None)

Manage Filters

Save Filter

Clear Filter

Search

Project Name

Issue Type

Issue Number

Summary

Description

Status

Color Status

Resolution

Activity Category

Add. Activity Category 1

Add. Activity Category 2

Custom Fields

Severity

Priority

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.

Issues

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.

Name	Type	Columns	Sorting
Issues 1-3	Private		2

Save filter

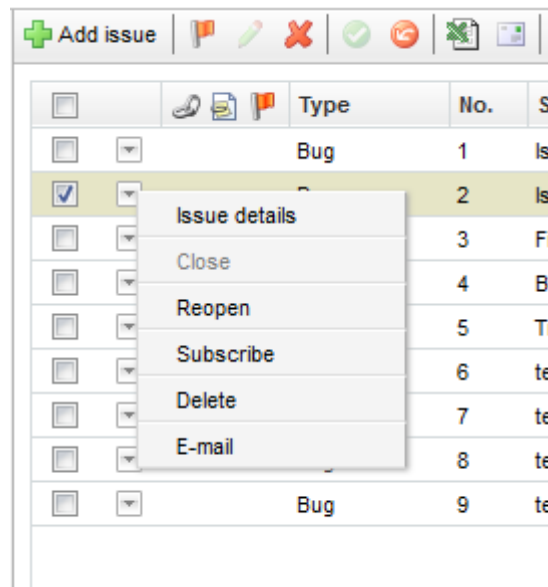
Issues Toolbar

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:

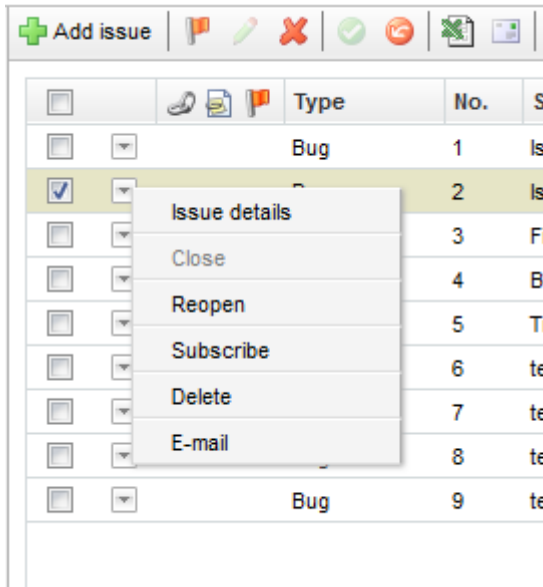


Context menu

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.

☐	  	Type	No.	Summary
☐		Bug	1	Issue 1
☐		Bug	2	Issue 2
☐	 	Standard	3	Find new pi

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.

Issues

Filters		Add issue Copy Goto issue									
Filters (None)											
Manage Filters Save Filter											
Clear Filter Search											
Search											
Project Name											

	No.	Type	Name	Status	Created Date	Assigned To	Modified Date	
	1	Fel	Fel 1	Stängd	04/12/2012	Fredrik Adolfss	19/05/2013	(2)
	2	Fel	Fel 2	Pågående	04/12/2012	Anders Lindgre	11/04/2013	(1)
	3	Fel	Fel i översättning	Ny	09/01/2013	Fredrik Adolfss	09/01/2013	(0)
	4	Fel	Fel i översättning 3	Ny	09/01/2013	Fredrik Adolfss	29/01/2013	(2)
	5	Fel	Fel 1	Stängd	15/01/2013	Fredrik Adolfss	20/01/2013	(0)
	6	Standard	Fel i driftsmiljö	Pågående	20/01/2013	Fredrik Adolfss	22/01/2013	(5)
	7	Fel	Fel i vägguppsättning	Ny	22/01/2013	Fredrik Adolfss	22/01/2013	(0)

Comments in the issue list

Issue Comments - 9

Per Kallhaug 18/03/2015 17:17:55

Please check:

- 1) how charts displayed if filters applied to data
- 2) localization when language is changed after user logged in (see attachments or ask me please for details)

Per Kallhaug 18/03/2015 17:18:13

Please change the localized value of the column "Project/phase" in the chart dropdowns to only "Project".

Currently it's using the same localization key as in the column select dialog for the list. They need to have different keys because the column selector should still be named "Project/phase".

Per Kallhaug 18/03/2015 17:18:45

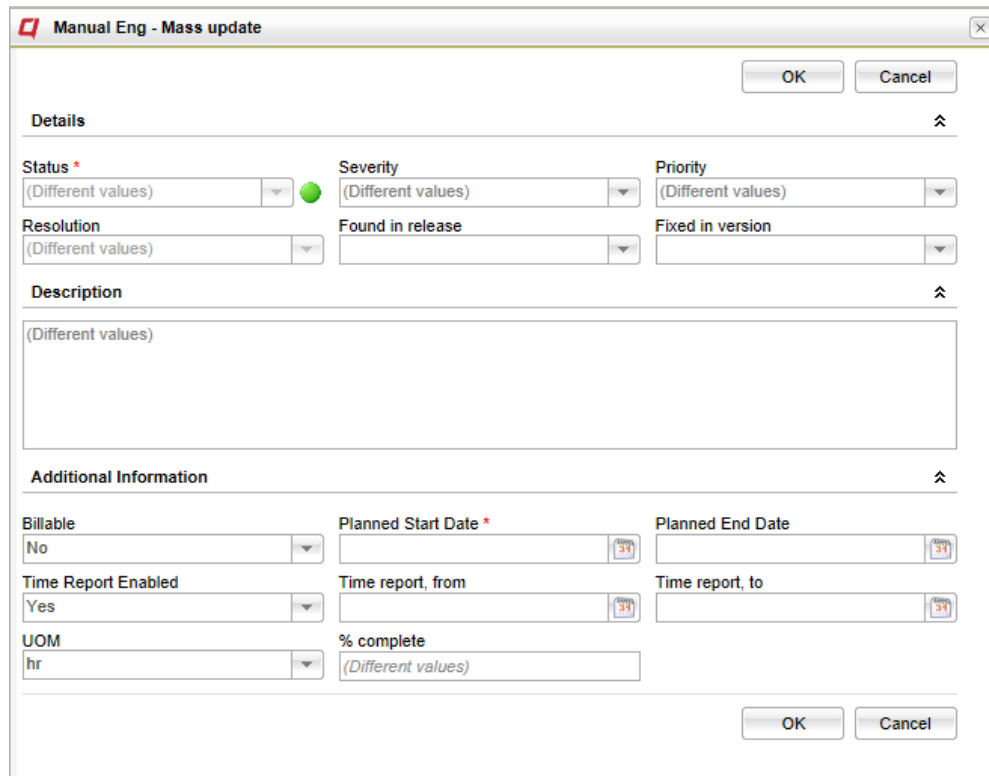
Display order for the values in the chart:

- Green
- Yellow
- Red
- Undefined

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.



The dialog box titled "Manual Eng - Mass update" contains the following fields:

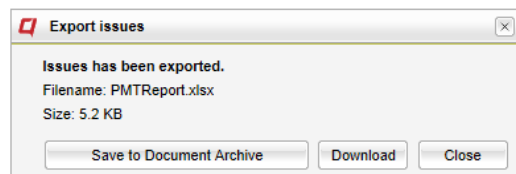
- Status ***: (Different values) [dropdown]
- Severity**: (Different values) [dropdown]
- Priority**: (Different values) [dropdown]
- Resolution**: (Different values) [dropdown]
- Found in release**: [dropdown]
- Fixed in version**: [dropdown]
- Description**: (Different values) [text area]
- Additional Information**:
 - Billable**: No [dropdown]
 - Planned Start Date ***: [calendar icon]
 - Planned End Date**: [calendar icon]
 - Time Report Enabled**: Yes [dropdown]
 - Time report, from**: [calendar icon]
 - Time report, to**: [calendar icon]
 - UOM**: hr [dropdown]
 - % complete**: (Different values) [text field]

Buttons: OK, Cancel (top right and bottom right).

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.



The dialog box titled "Export issues" displays the following information:

- Issues has been exported.
- Filename: PMTReport.xlsx
- Size: 5.2 KB

Buttons: Save to Document Archive, Download, Close.

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

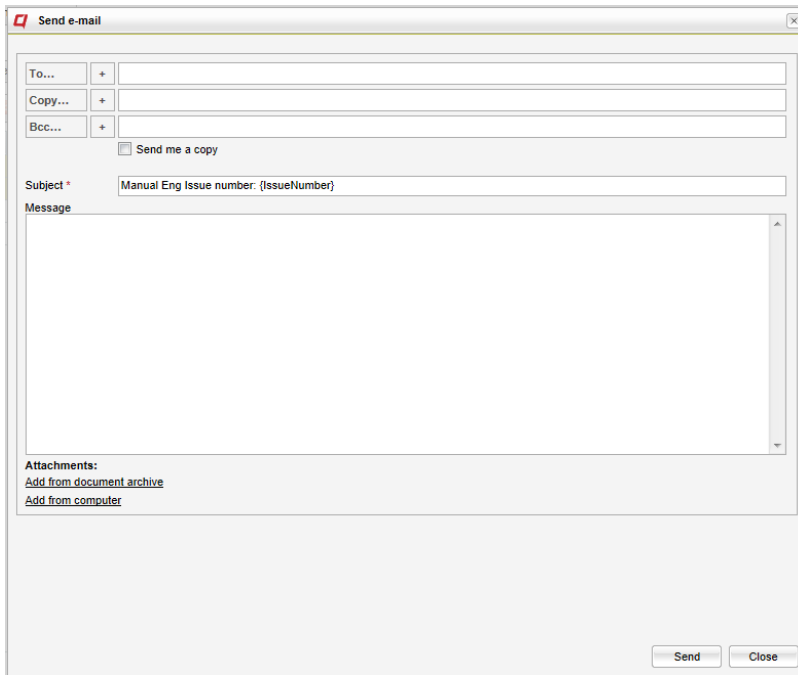
Export file

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.

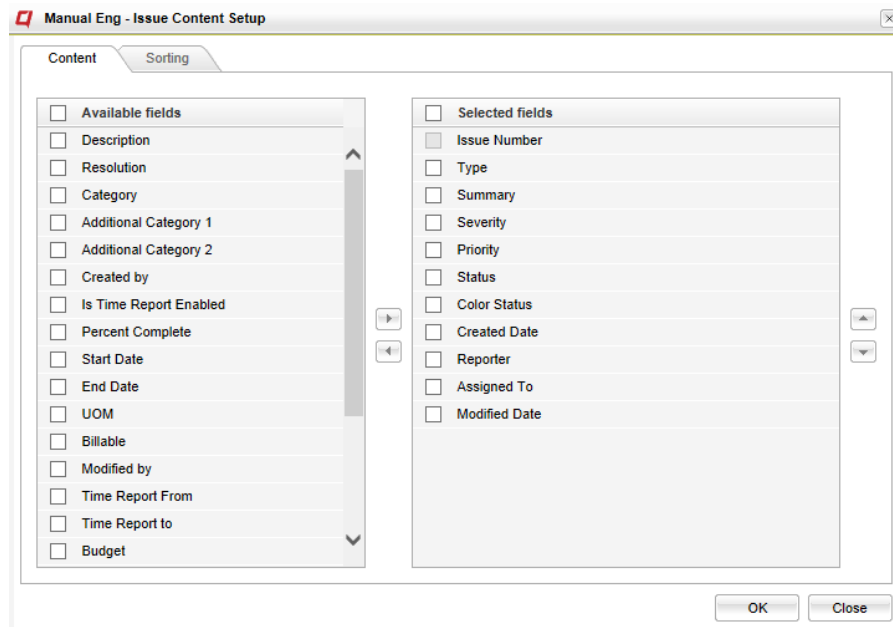


Send e-mail

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

Column selection

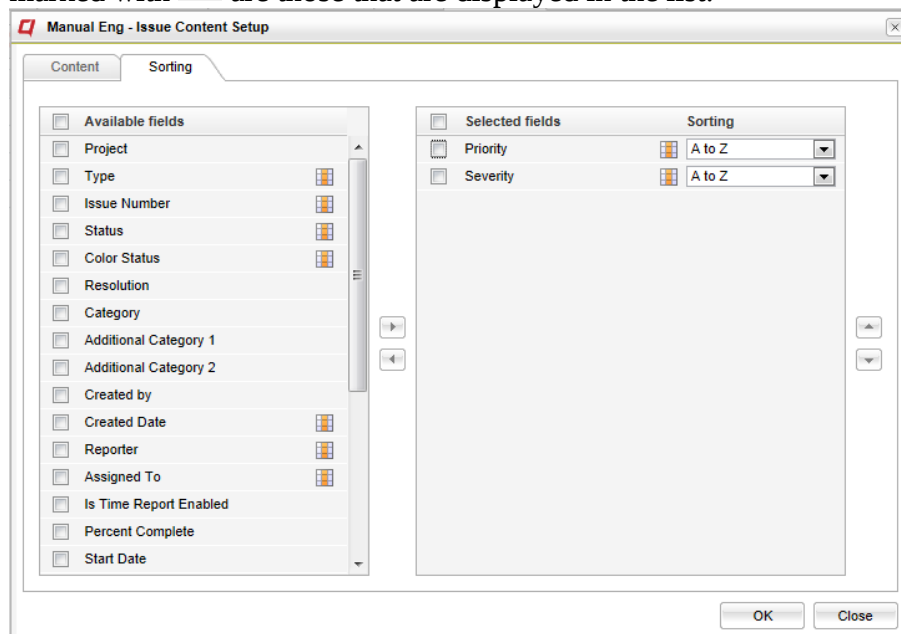
Clicking the column selection icon  opens the content setup window with the Content tab open. Choose which fields to display in the list by selecting them and moving them to the right hand side. Issue number is always displayed.



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.

1 - Issue 1
[Add issue](#)
[Back to list](#)
1 of 12

Assign
Comment
Change Status

More actions

Summary *

Issue 1

Description

Layout error in module x, see screenshot below.

Attachments

New risk.png

88 KB 03/09/2014 10:11

Linked Issues

6 test

Comments

Fredrik Adolfsson 04/01/2013 12:34:33

I suggest that.....

Fredrik Adolfsson 31/01/2013 14:13:06

.....

Fredrik Adolfsson 13/05/2013 18:53:21

This is a very long comment

row 2

row 3

row 4

Additional Information

Billable

☐

Planned Start Date *

03/10/2012

Planned End Date

03/10/2012

Time Report Enabled

☒

Time report, from

03/10/2012

Time report, to

20/08/2014

Budget

0

ETC

0

UOM

hr

Spent

0

Forecast

0

% complete

Project Name

Demo Project

Reporter

Adolfsson, Fredrik (fredrik.adolfssor)

Assigned to

Unassigned

Manage assignments

Issue Type

Bug

Status

Closed

Color Status

Yellow

Resolution

Solved

Severity

1 - Critical

Priority

3 - Medium

Found in release

Fixed in version

Created by:

Fredrik Adolfsson 17/12/2012

Modified by:

Fredrik Adolfsson 06/08/2014

[History](#)

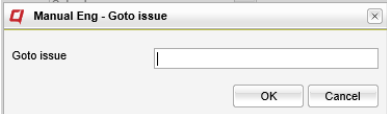
The issues details page

Menu row items

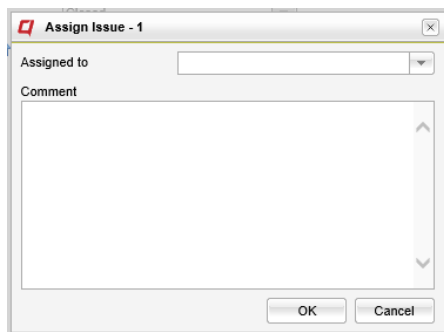


“**Add issue**” will add another issue.

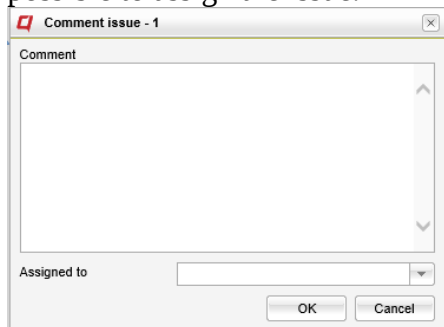
“**Back to list**” will take you back to the issues list.

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. 

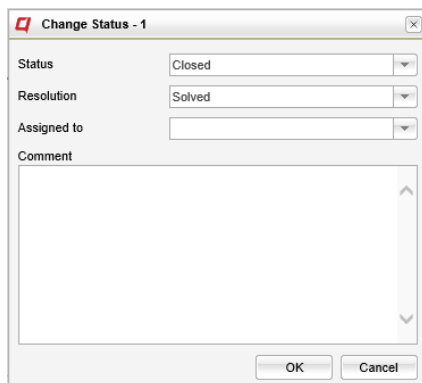
“**Assign**” will assign the issue to a user of choice via a pop-up window. It is also possible to add a comment.



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

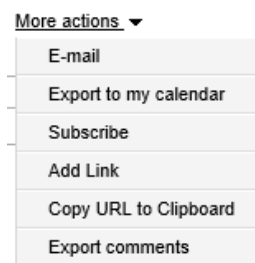


“**Change status**” will change the status via a pop-up window where it is also possible to add a resolution, assign the issue and write a comment.



A dialog box titled "Change Status - 1" with a close button (X) in the top right corner. It contains four fields: "Status" with a dropdown menu showing "Closed", "Resolution" with a dropdown menu showing "Solved", "Assigned to" with an empty dropdown menu, and "Comment" with a large text area. At the bottom are "OK" and "Cancel" buttons.

Click “**More actions**” to find additional options;



A dropdown menu titled "More actions" with a downward arrow. It lists several options: "E-mail", "Export to my calendar", "Subscribe", "Add Link", "Copy URL to Clipboard", and "Export comments".

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

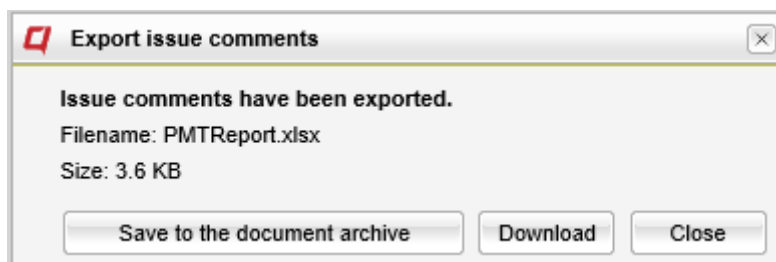
“**Export to my calendar**” will export the issue to a calendar that supports the iCal format.

“**Subscribe**” will add the issue to your subscriptions.

“**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.



A dialog box titled "Export issue comments" with a close button (X) in the top right corner. It displays the message "Issue comments have been exported." followed by "Filename: PMTReport.xlsx" and "Size: 3.6 KB". At the bottom are three buttons: "Save to the document archive", "Download", and "Close".

Issue comment download

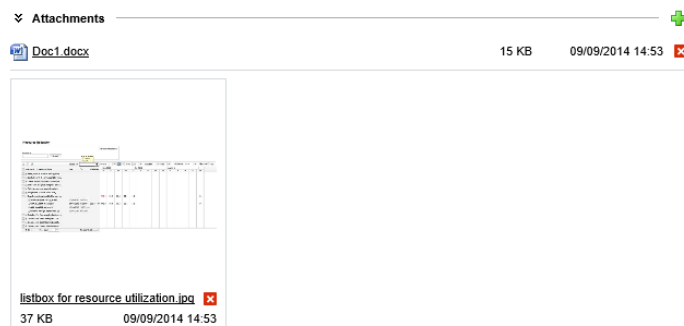
The following fields are also available:

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)

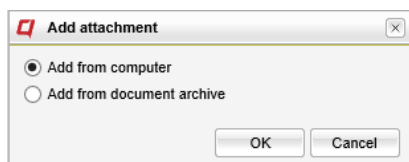
Attachments

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.



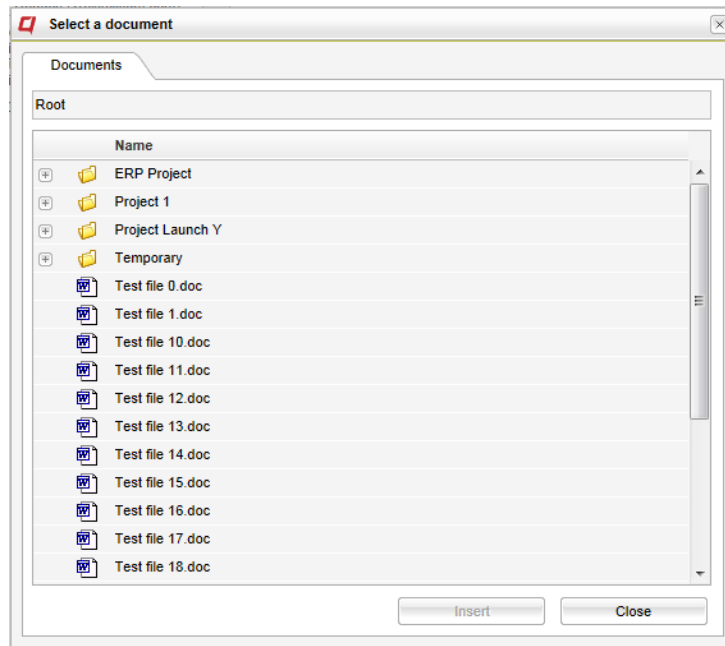
Add from document archive or computer

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.



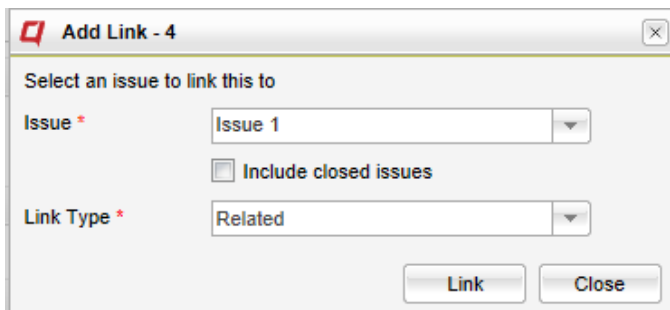
Link documents dialog

Links

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



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  

New comment 

Fredrik Adolfsson 04/01/2013 12:34:33

I suggest that.....

Fredrik Adolfsson 31/01/2013 14:13:06

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 - 3   		
Field	Old value	New value
Fredrik Adolfsson created issue 03/01/2013 16:03:38		
Type		Standard
Summary		Find new project manager
Description		Test
Severity		3 - Medium
Priority		2 - High
Status		New
Color Status		Green
Resolution		
Category		Standard Services
Additional Category 1		Standard
Additional Category 2		Standard
Reporter		Fredrik Adolfsson (fredrik.adolfsson@webforum.c
Assigned To		Adolfsson, Fredrik (fredrik.adolfsson@webforum.c
Is Time Report Enabled		True
Percent Complete		
Start Date		03/10/2012 00:00:00
End Date		03/10/2012 00:00:00
LIOM		hr

Close

Issue History

Assignments

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

Assigned to *

Unassigned

[Manage assignments](#)

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 - 1 Issue 1

Name Search

☒ Show all Users and Resources

☐ Available resources

- ☐ Kotkajuri, Pekka (pekka.kotkajuu...)
- ☐ Project Manager
- ☐ Rogach, Yuriy (yro@ciklum.com)
- ☐ System Developer

Issue time reportable from/to 03/10/2012 - 03/10/2012

Assigned resources	Time report from	Time report to	Rate	Budget	ETC	Spent	Forecast
☐ Adolfsson, Fredrik (fredr...)			300.00	500.00	500.00	0.00	0.00

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

Billable ☐

Time Report Enabled ☒

Budget

Spent

Planned Start Date *

Time report, from

ETC

Forecast

Planned End Date

Time report, to

UOM

% complete

Additional information

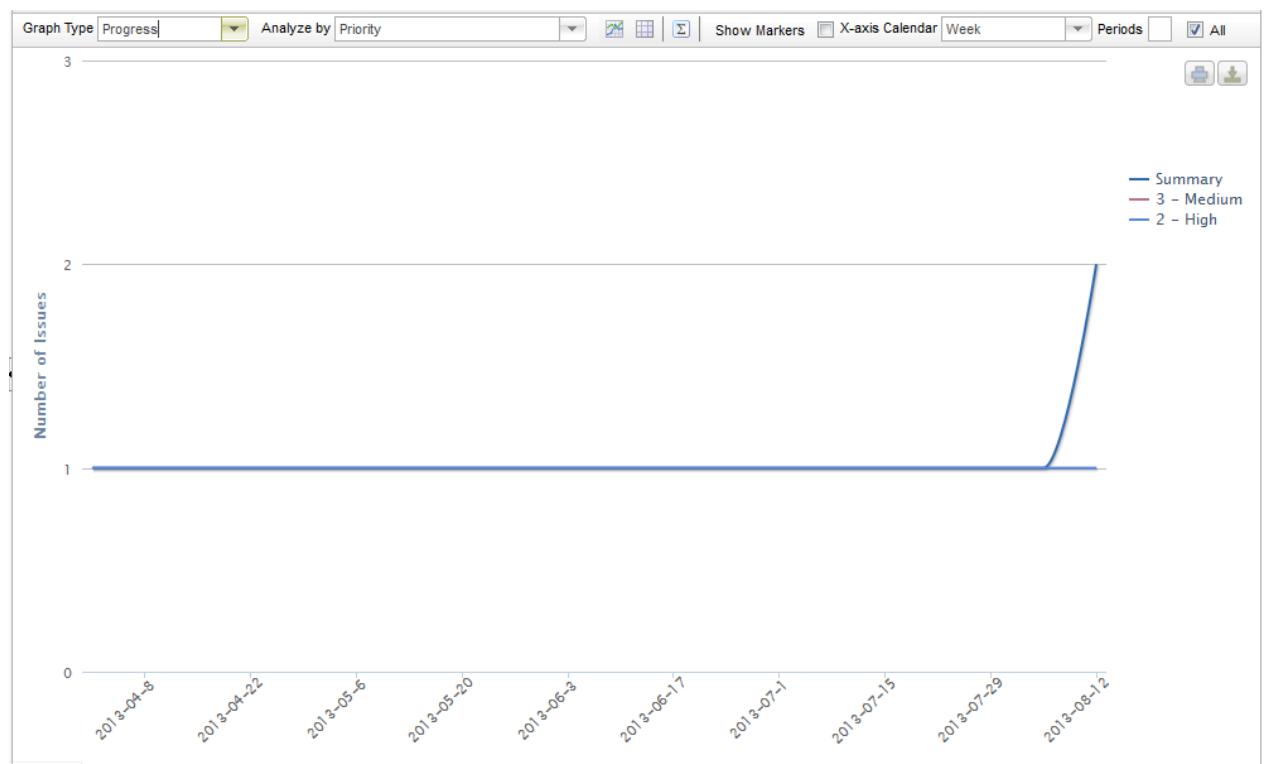
Charts

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.

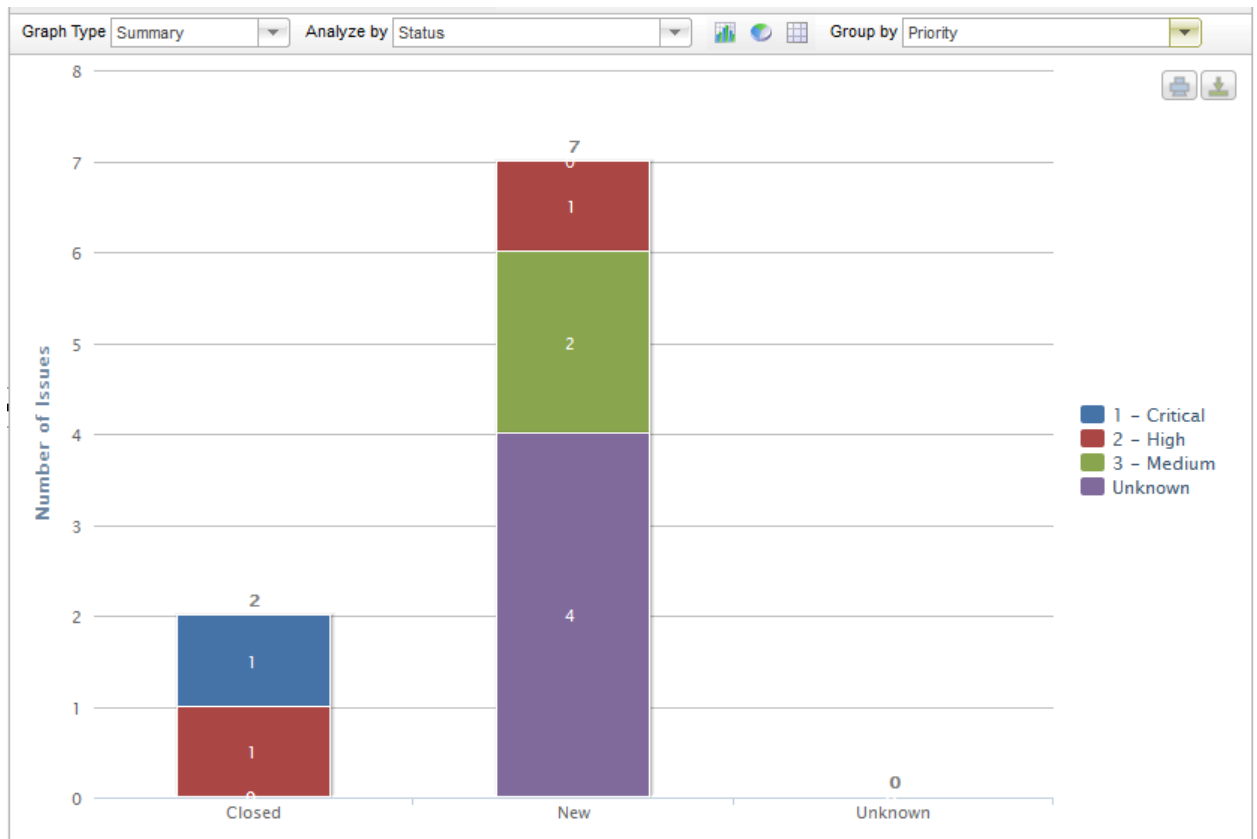
There are two main charts to choose from – progress and summary.

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.

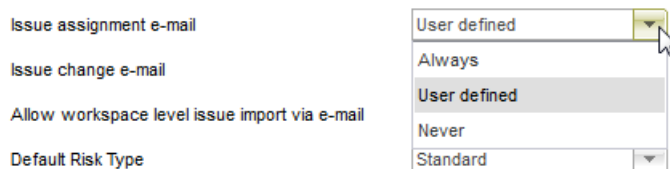
Control of issue notification e-mail distribution

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.

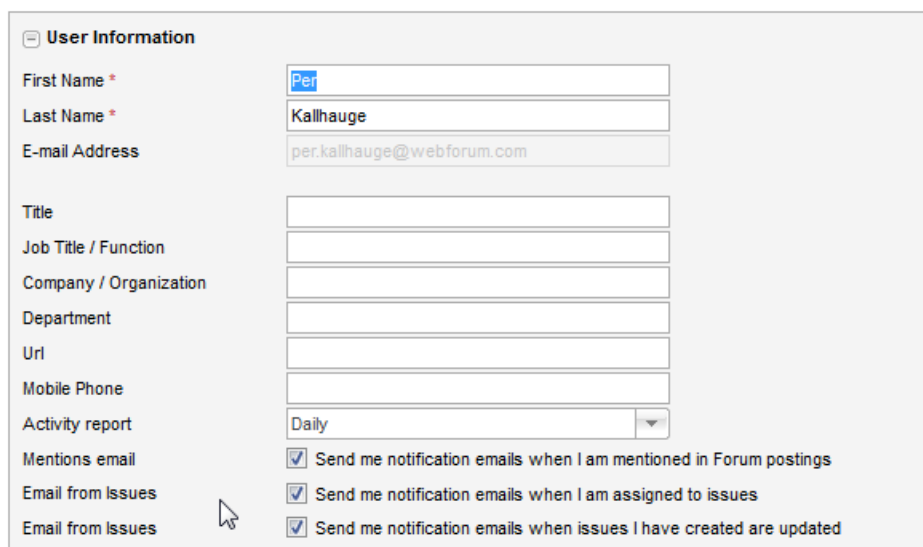


The screenshot shows a configuration interface with the following elements:

- Labels on the left: "Issue assignment e-mail", "Issue change e-mail", "Allow workspace level issue import via e-mail", and "Default Risk Type".
- A dropdown menu on the right is open, showing the following options: "User defined" (selected), "Always", "User defined" (highlighted), "Never", and "Standard".

Setup parameters for e-mail notifications in System Options

My Profile



The screenshot shows the "My Profile" page with the following sections:

- User Information** (collapsed):
 - First Name *: Per
 - Last Name *: Kallhauge
 - E-mail Address: per.kallhauge@webforum.com
 - Title: (empty field)
 - Job Title / Function: (empty field)
 - Company / Organization: (empty field)
 - Department: (empty field)
 - Url: (empty field)
 - Mobile Phone: (empty field)
 - Activity report: Daily
- Notification settings:
 - Mentions email: ☒ Send me notification emails when I am mentioned in Forum postings
 - Email from Issues: ☒ Send me notification emails when I am assigned to issues
 - Email from Issues: ☒ Send me notification emails when issues I have created are updated

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.

The screenshot shows the 'Filter fields' pane on the left and the 'Risk list' table on the right.

Filter fields pane:

- Favorite filters: (None)
- Manage Filters: [Manage Filters](#) [Save Filter](#)
- Clear Filter: [Clear Filter](#) Search: [Search](#)
- Risk Type:
- Risk Number: -
- Risk Name:
- Probability:
- Consequence:
- Score: -
- Mitigation:
- Closed:
- Custom Fields: [Custom Fields](#)

Risk list table:

	Risk	Risk Type	Risk Name	Probability	Consequence	Score	Mitigation	Closed
☐	1	Resources	Contract with supplier not signed	1 - Low	3 - Major	3	Get legal to speed up review	No
☐	2	Resources	No programmers available	3 - High	2 - Medium	6	Try to find suitable consultants	No
☐	3	Budget	Budget problem 2013	3 - High	3 - Major	9	There are indications that the pr	No
☐	4	Resources	Key reosurces get ill	1 - Low	1 - Minor	1		No

Risk list

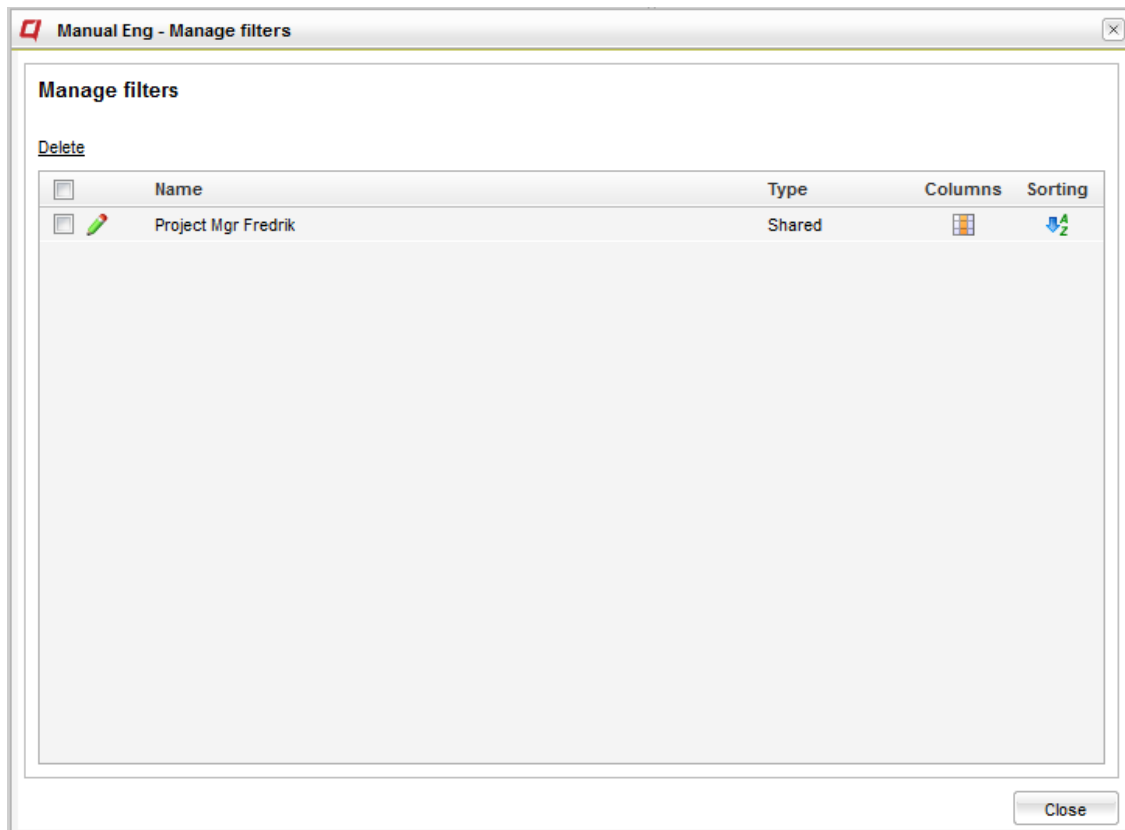
In the left pane there is a filter function. It is possible to save different filters. When saving a filter, it is possible to choose the “Shared filter” option so that others can use the filter.

The screenshot shows the 'Manual Eng - Save filter' dialog box with the following fields and options:

- Name:
- Shared filter: ☐
- OK: [OK](#)
- Cancel: [Cancel](#)

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 risk	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 Mode  	Display as list  or graphs 
	Show risk history
	Risk set up

Add risk opens the details window for the new risk.

Back Add Save Cancel

Risk Number Risk Name *

Probability 1 - Low Consequence 1 - Minor Score 1

Type Not set Closed

Mitigation

Back Add Save Cancel

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.

Send e-mail

To... + Fredrik Adolfsson

Copy... +

Bcc... +

☐ Send me a copy

Subject * Manual Eng Issue Number: {RiskNumber}

Message

Please review the attached risks

[Add from document archive](#)

[Add from computer](#)

Send Close

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.

Risks Content Setup

Content Sorting

Available fields

- ☐ Created by
- ☐ Created Date
- ☐ Modified by
- ☐ Modified Date

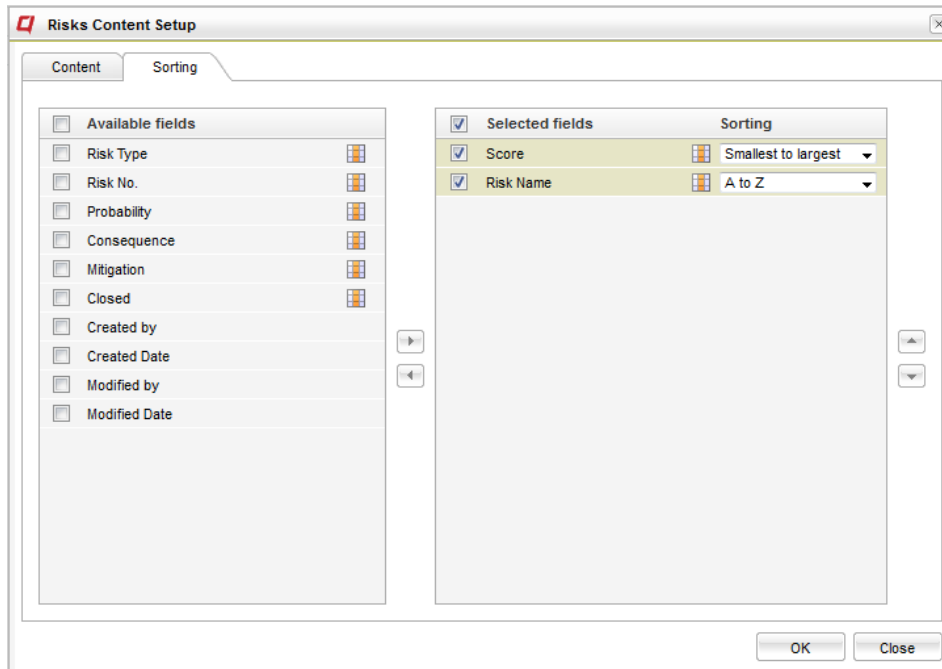
Selected fields

- ☐ Risk No.
- ☐ Risk Type
- ☐ Risk Name
- ☐ Probability
- ☐ Consequence
- ☐ Score
- ☐ Mitigation
- ☐ Closed

OK Close

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.

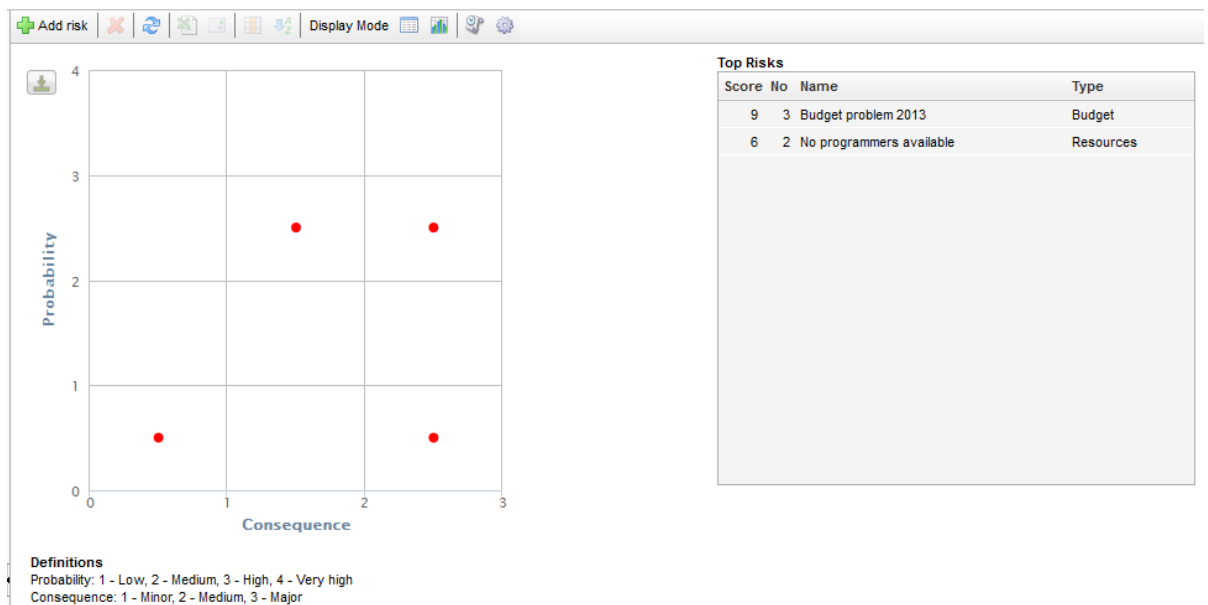


Risk sorting

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.

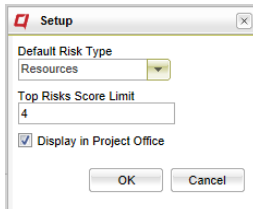


Graph mode

Risk history  shows the log of changes to all risks.

Risk set up – Risk type, top risk score limit and whether 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.



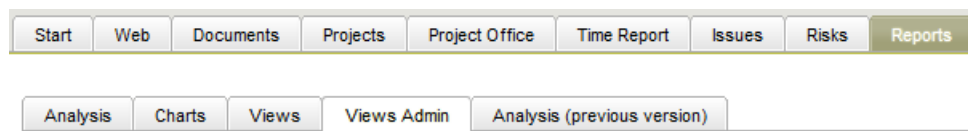
Risks set up

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.

The screenshot shows the 'Analysis' tab in the 'ECM Test Platform 10001' application. The interface includes a top navigation bar with tabs like 'Start', 'Web', 'Documents', 'Projects', 'Project Office', 'Time Report', 'Issues', 'Risks', 'Reports', 'Resources', 'Forum', 'Tasks', 'Calendar', and 'More'. The 'Reports' tab is active, showing a report configuration panel on the left and a data table on the right.

Report configuration panel (left):

- Report content:** Includes 'Values', 'Columns', 'Rows', and 'Filters' sections.
- Columns:** 'Year' is selected.
- Rows:** 'Month' is selected.
- Filters:** 'Year' is selected with a range of 2011, 2012, 2013, 2014, 2015, 2016, 2017.
- Report components:** A tree view showing various measures and dimensions. 'Customer' is expanded, showing 'Billable Customer' and 'Customer Name'.

Data table (right):

The table is titled 'Billable customers' and displays data for the years 2011 through 2017, with a 'Grand Total' column. The rows represent months from January to December.

	2011	2012	2013	2014	2015	2016	2017	Grand Total
Jan	1,028.16	3,174.89	39,076.85	2,964.45	130.35	0.04	595.77	46,970.51
Feb	697.15	2,415.42	162,972.04	1,555.24	207.83	459.12	541.61	188,948.41
Mar	11,951.26	4,243.85	398,108.97	3,040.14	1,402,169,649.11	622.85	622.85	1,402,588,239.03
Apr	6,633.49	5,984.30	141,911.73	438.10	517.81	568.69	541.60	156,595.71
May	5,164.13	8,690.43	138,481.60	162.31	494.28	595.77	622.80	154,211.32
Jun	3,614.98	16,225.68	69,634.98	1,379.97	517.81	595.77	595.72	92,564.91
Jul	1,666.13	23,048.70	32,016.76	307.14	479.38	568.69	568.64	58,655.44
Aug	1,944.41	19,469.77	30,686.51	33.91	436.19	622.85	622.80	53,816.43
Sep	15,027.55	37,542.46	11,508.40	2,964.75	456.59	595.77	568.64	68,684.16
Oct	3,972.05	43,553.62	3,037.87	5,185,185,355.07	456.59	568.69	595.72	5,185,237,539.60
Nov	11,634.21	196,239.26	2,504.35	145.67	415.08	595.77	595.72	212,130.05
Dec	13,017.16	78,193.43	10,002,410.04	132.42	0.05	595.77	568.64	10,094,917.50
Grand Total	76,350.68	438,781.80	11,052,350.11	5,185,198,499.17	1,402,173,761.07	6,389.76	7,040.49	6,598,953,173.07

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.

The 'Report components' panel shows a list of measures with checkboxes for selection:

- Measures
 - Units ☒
 - Amount ☐
 - Cost ☐
 - Gross margin ☐

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.

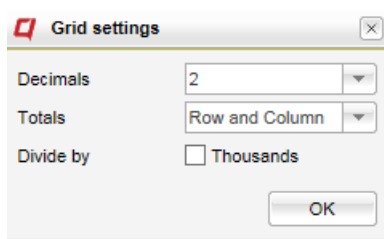


The filter dialog is opened with the filter icon 

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



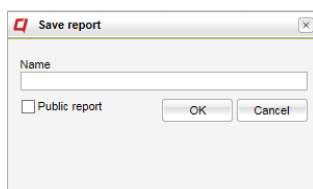
The number of decimals displayed can be selected with the Decimals list box.

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.



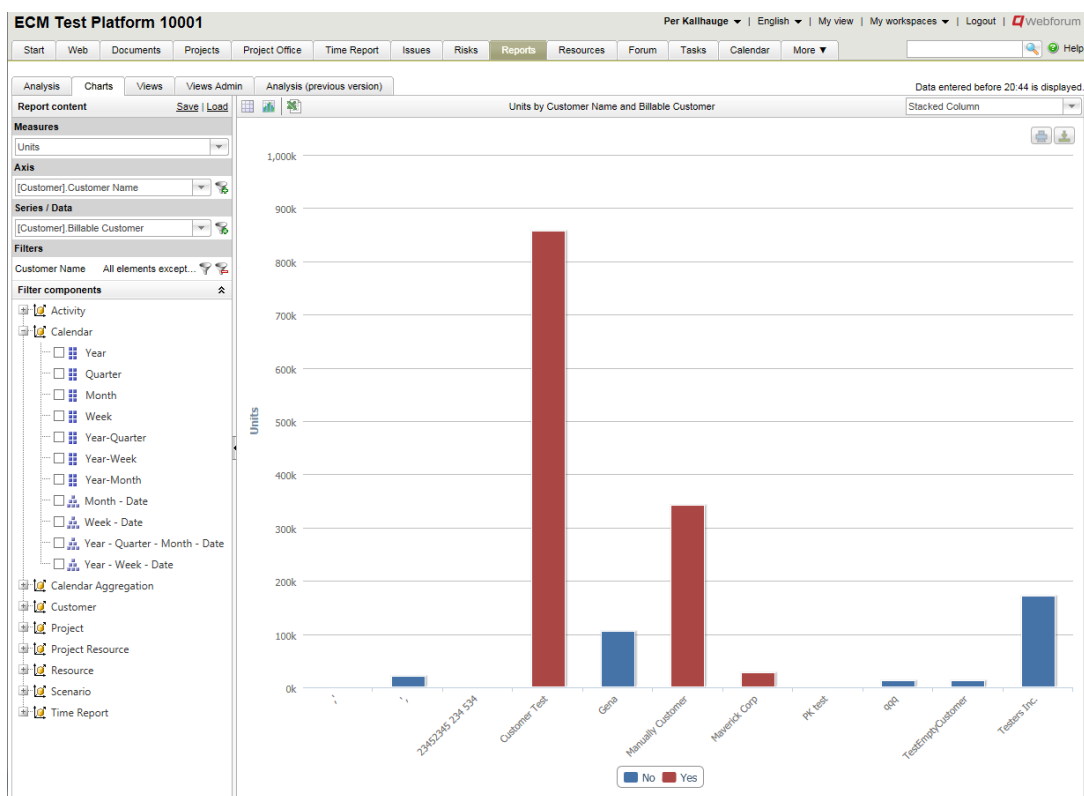
Previously saved reports can be opened with the Load Report function.



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

Report content: Save Load

Units by Customer Name and Billable Customer

Data entered before 20:44 is displayed.

			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

Customer Name

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.

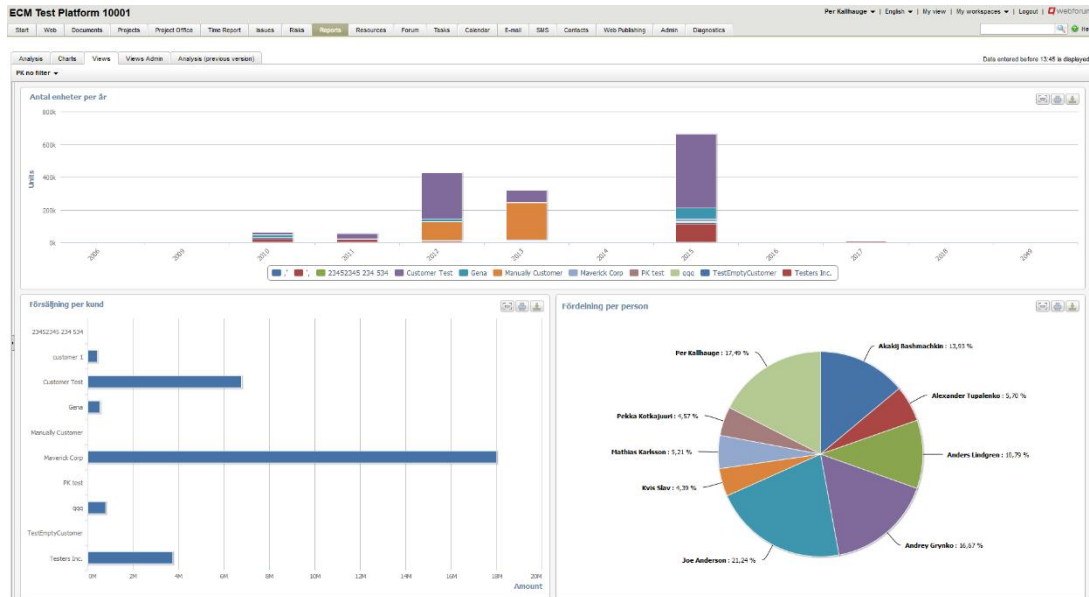
You can also choose to display the chart report in grid format.

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

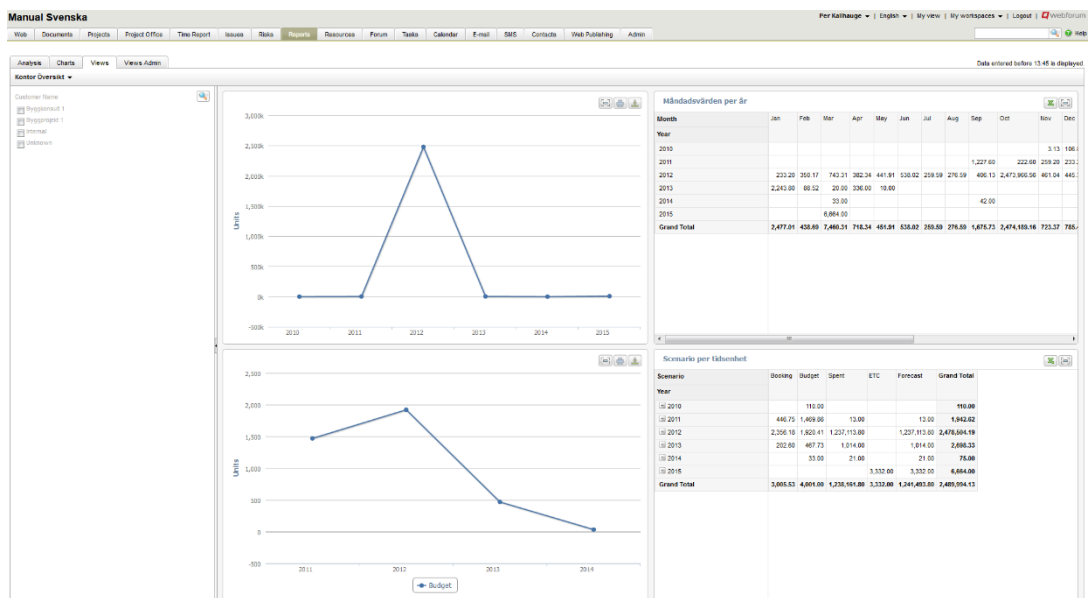
Views (dashboard)

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 

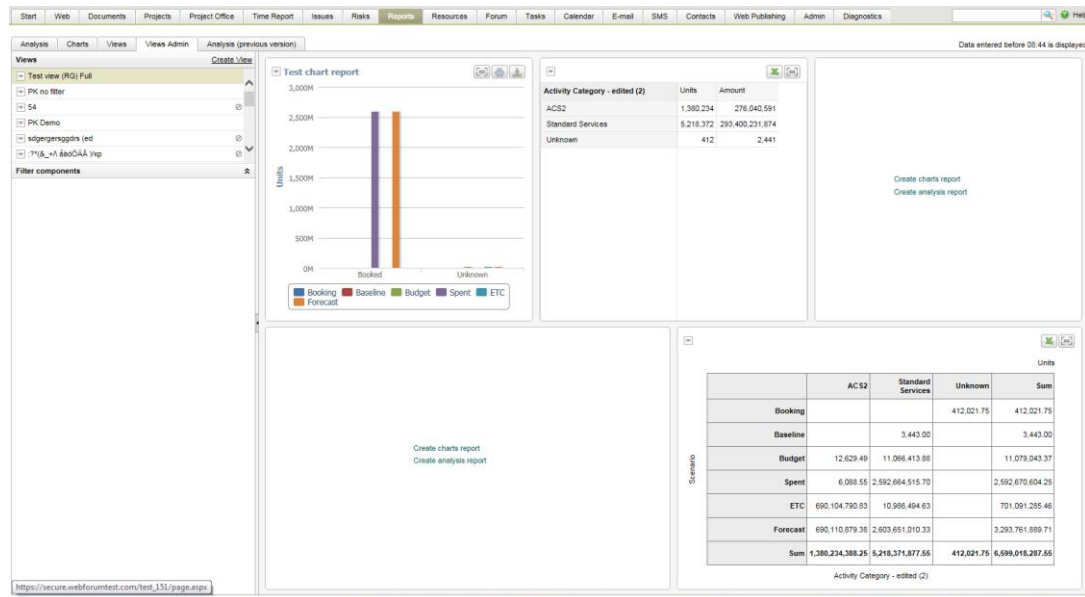
Click on the print icon  to print the chart

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 .

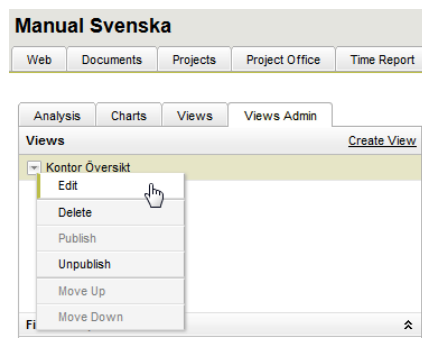
Views Admin

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 Create 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: PK no filter

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.

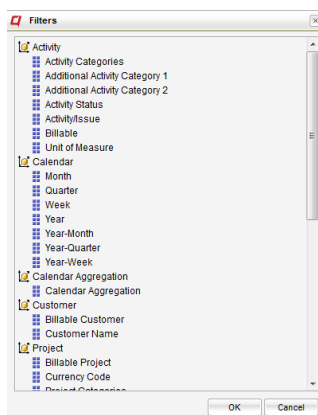
Rows are added with the Add row button.

Rows are deleted the delete icon  on each row.

Switch order of the rows are done with the arrows  .

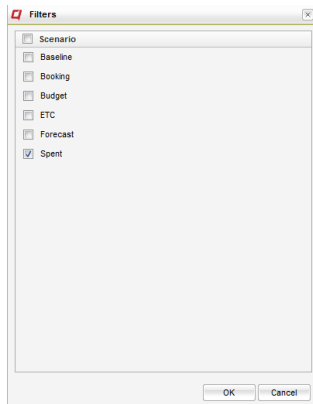
Filters might be added to the view. The filters are applicable for all reports in the view. For each filter dimension, default values can be added.

Filter dimensions are added with the Add filter button.



Filter dimension dialog

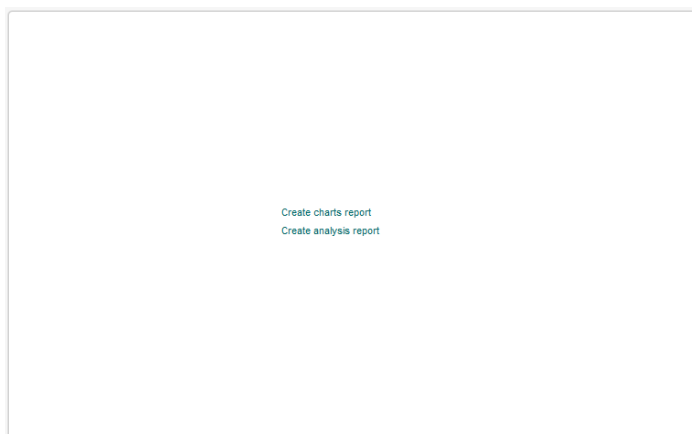
Default values are added/edited with the filter  icon. When clicked on, the member selection dialog is opened.



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.

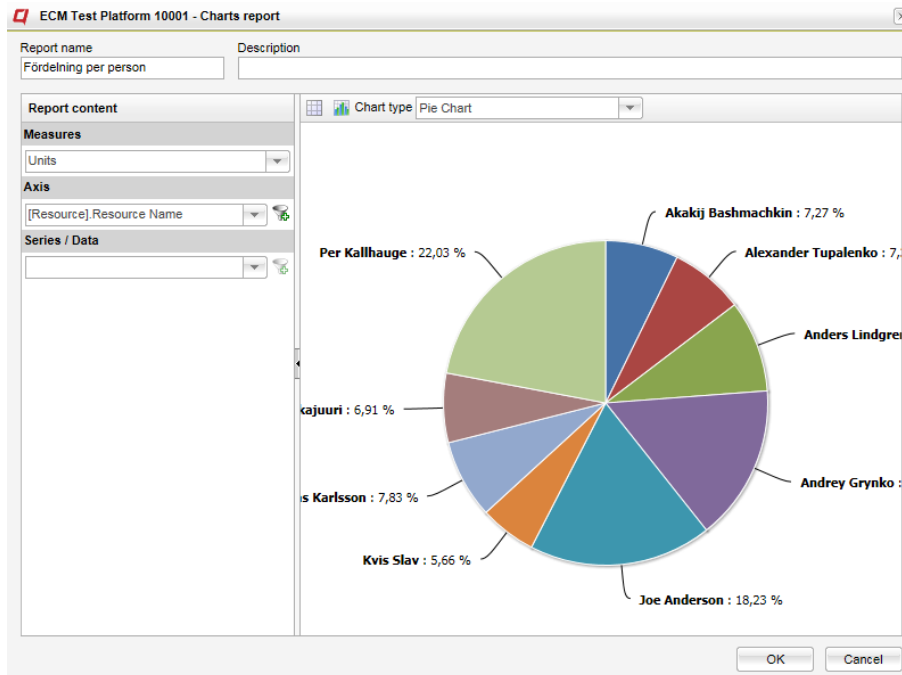


Chart dialog

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

The dialog shows an analysis report with the following pivot table:

Month	Jan	Feb	Mar	Apr
Category 1a - 3				
1	92.76	237.30	1,380,214,836.92	5,336.4
3			50.00	
4			75.00	
9		1.81	6.19	
ACC11	96.00	132.13	1,328.89	
ACC12		9.67	15,064.95	14.3
Standard2	57.00		20,002,301.00	
Unknown	50,306.91	190,680.20	2,369,469.97	164,382.7
Grand Total	50,552.68	191,061.11	1,402,603,132.92	169,734.3

Analysis dialog

Analysis (previous version)

Web Documents Projects Project Office Time Report Issues Reports Resources Forum Tasks Calendar E-mail SMS More Help

Reports and Analysis

Analysis: Charts

Data entered before last processed time is displayed.
Data Last Processed: 11/09/2013 13:44 (GMT+01:00) Amsterdam, Berlin, Rome, Stockholm, Vienna

Values

Units

Rows area

Project Name

Cube structure

Measures

- Amount
- Cost
- Gross margin
- Units

Activity

- Calendar
- Month - Date
- Week - Date
- Year - Quarter - Month - Date
- Year - Week - Date

Customer

- Project
- Additional Project Category 1
- Additional Project Category 2
- Billable Project

Filter area

Item Filter description

Columns area

Year - Quarter - Month - Date

Year

Quarter

2010 2011 2012 2013

Q1-2013 Q2-2013 Q3-2013 Q4-2013 2013 Total

Project Name

Project Name	2010	2011	2012	Q1-2013	Q2-2013	Q3-2013	Q4-2013	2013	Total
Demo Project	32.97	259.68	291.68	63.92	100.92	123.92	57.93	346.68	931.00
Demo Project Sep 2012			504.00		2.00	588.00		590.00	1,094.00
ERP			465.59	50.00	98.00	234.00		382.00	847.59
Total	32.97	259.68	1,261.27	113.92	200.92	945.92	57.93	1,318.68	2,872.59

Ready

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

By Resource By Project

Booking Mode Planning Mode

Filters

Filters (None)

Manage Filters Save Filter

Clear Filter Search

Average utilization

From (%) To (%)

From To

Resource

Resource

Resource Type

Job Roles

Users in Group

Resource Categories

Members in Project

Resource / Project

Start End Booking

Adolfsson, Fredrik (fredrik.adolfsson@webforum.com)

CRM (Internal)

Demo Project (Internal)

ERP (Internal)

Arvidsson, Johan (johan.arvidsson@webforum.com)

Kallhaug, Per (per.kallhaug@webforum.com)

Kotkajuri, Pekka (pekka.kotkajuri@webforum.com)

Lindgren, Anders (anders.lindgren@webforum.com)

Olinyk, Volodymyr (vol@ciklum.com)

Project Manager

Rogach, Yuriy (yuriy@ciklum.com)

System Developer

Тестировщик, Иропек (igra@ciklum.com)

Periods 3

Utilization Allocated

Display as Units

Week Month Year Week No

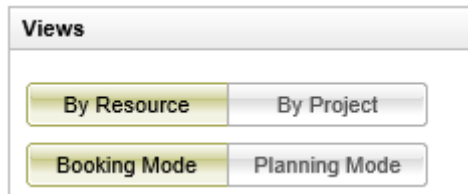
2013

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
23.4	29.1	21.3	22.3	23.4	29.3	173.4	100.0	100.0	100.0
0.0	0.0								
0.0	0.0	0.0	0.0	0.0	0.0	150.0	100.0	100.0	100.0
23.4	20.3	21.3	22.3	23.4	20.3	23.4			
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
13.9	12.1	12.7	13.3	103.9	102.1	103.9			
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

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.



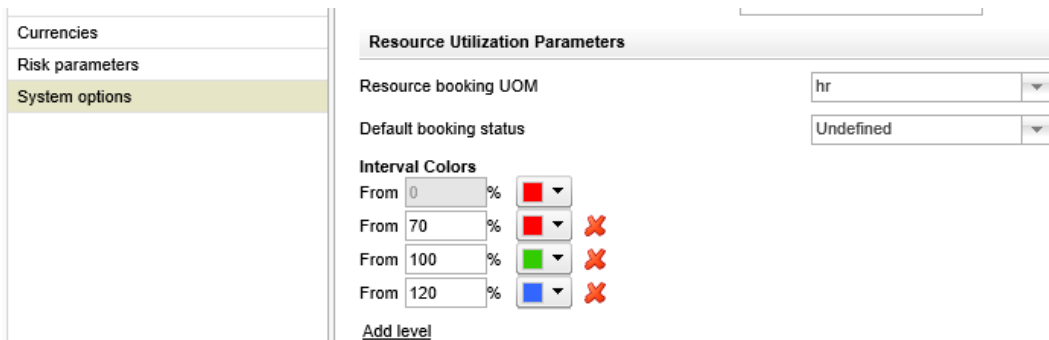
Resource / Project			Start	End	Booking
☐ Adolfsson, Fredrik (fredrik.adolfss...)					
☐ CRM (Internal)			16/02/2012	07/02/2013	0.00
☐ Demo Project (Internal)			15/02/2012	31/07/2014	970.00
☐ ERP (Internal)			01/11/2012	31/07/2013	197.99
☐ Arvidsson, Johan (johan.arvidsson@w...					

2013				
Jan	Feb	Mar	Apr	
23.4	20.3	21.3	22.3	
0.0	0.0			
0.0	0.0	0.0	0.0	
23.4	20.3	21.3	22.3	
0.0	0.0	0.0	0.0	

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.



Resource Utilization Parameters

Resource booking UOM:

Default booking status:

Interval Colors

From	To	Color
0	70	Red
70	100	Red
100	120	Green
120		Blue

[Add level](#)

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.

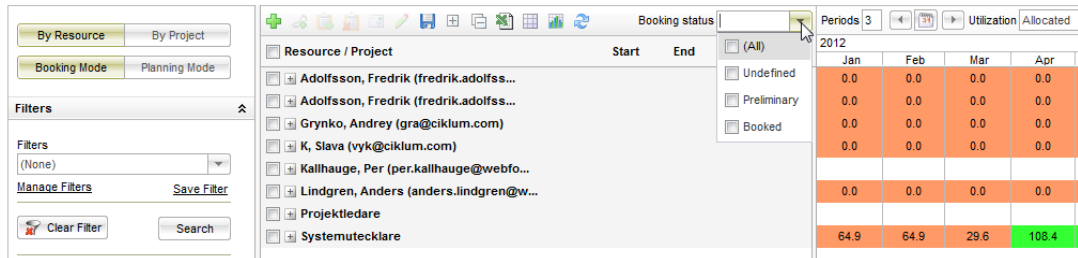
By Resource	By Project
Views By Resource By Project Booking Mode Planning Mode	Views By Resource By Project Booking Mode Planning Mode
Filters Filters (None) Manage Filters Save Filter Clear Filter Search	Filters Filters (None) Manage Filters Save Filter Clear Filter Search
Average utilization From (%) To (%) - 50.00 From To 01/08/2014 - 30/09/2014 Resource Resource Type Job Roles Users in Group Resource Categories Members in Project	Projects Project Name Project number Status Customer name Reference Enabled Project Category Additional Category 1 Additional Category 2 Portfolio Project Manager Priority
	Resources Resource

Filtering

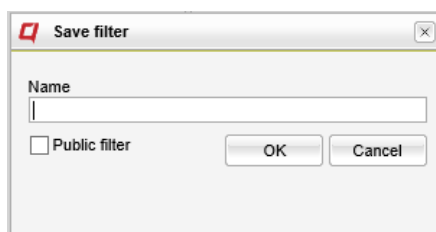
Filters can be saved by clicking “Save Filter” and saved filters can be changes by clicking “Manage filters”. Saved filters can be either private or public.

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

Resource Utilization



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

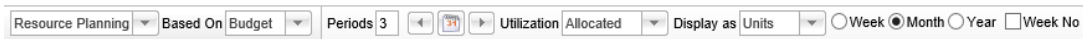
When exporting, data will be displayed in cells, see example below:

	A	B	C	D	E	F	G	H	I
1	Resource / Project / Activity	Start	End	Budget	UOM	Date	01/09/2014	08/09/2014	15/09/2014
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 utilization 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

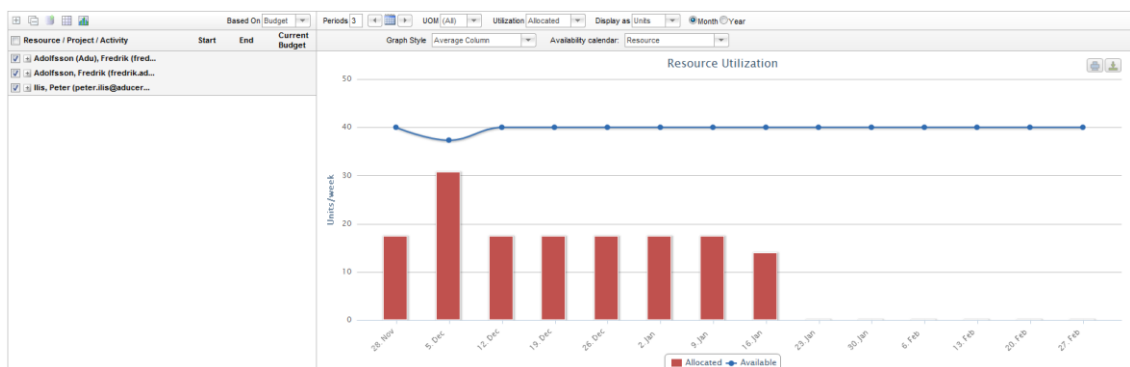
The resource utilization view will show if a person is over allocated based on the resource calendar. When the allocation is shown in percent, resource-specific calendar exceptions will be considered, i.e. if a person is working part time 20 hours a week, a 20 hour allocation of time will be displayed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

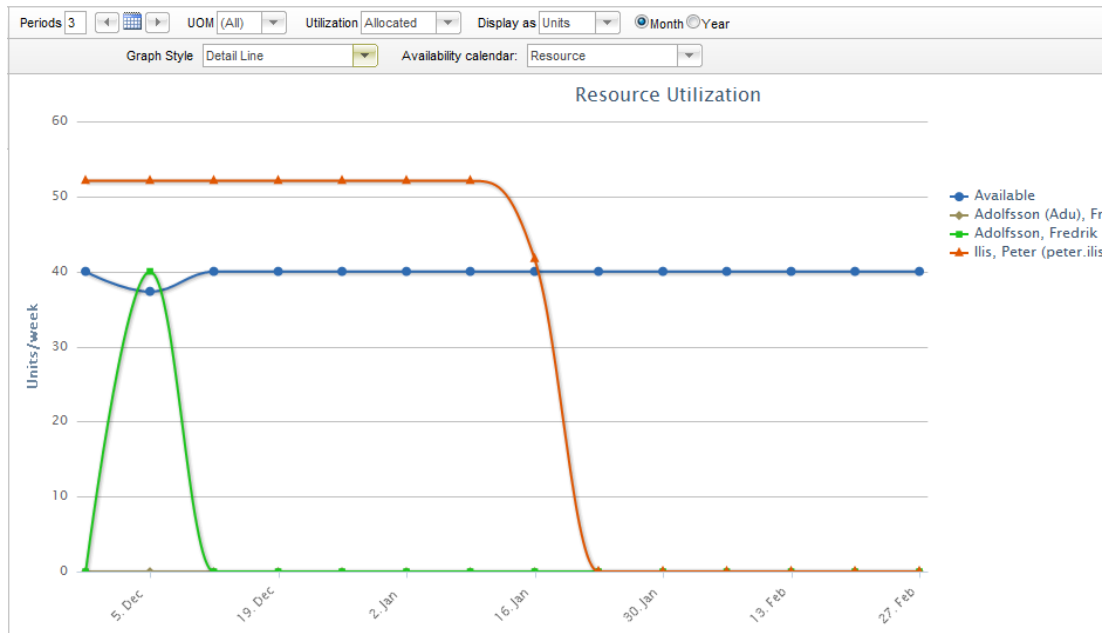
Chart view

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 / Project				Start	End	Booking	Periods 3										
							2013	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
☒ Adolfsson, Fredrik (fredrik.adolfss... ☒ CRM (Internal) 16/02/2012 07/02/2013 0.00 ☐ Demo Project (Internal) 15/02/2012 31/07/2014 970.00 ☐ ERP (Internal) 01/11/2012 31/07/2013 197.99 ☐ Arvidsson, Johan (johan.arvidsson@w... ☐ Kallhauge, Per (per.kallhauge@webfo...								23.4	20.3	21.3	22.3	23.4	20.3	173.4	180.0	160.0	160.0
								0.0	0.0								
								0.0	0.0	0.0	0.0	0.0	0.0	150.0	180.0	160.0	160.0
								23.4	20.3	21.3	22.3	23.4	20.3	23.4			
								0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
								0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Resource booking in Resource Utilization

Demo Project Sep 2012

Details		Resources		Planning		Activity Details		Resource Allocation		Budget and control		Risks		Permissions																	
										Periods		3		 		Display Mode		Units		Booking											
☐ Resource										Booking		Sep 2012		Oct 2012																	
☐ Adolfsson, Fredrik (fredrik.adolfsson@webforum.com)										▲ !		160.00		27		3		10		17		24		1		8		15		22	
☐ System Developer										▲ !		400.00		40.0		40.0		40.0		40.0											
														100.0		100.0		100.0		100.0											

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.

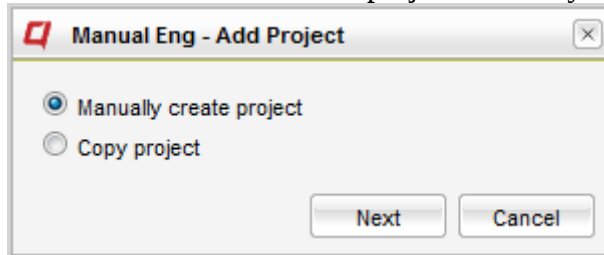
The toolbar contains a number of icons related to bookings in addition to the icons explained above under planning.



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

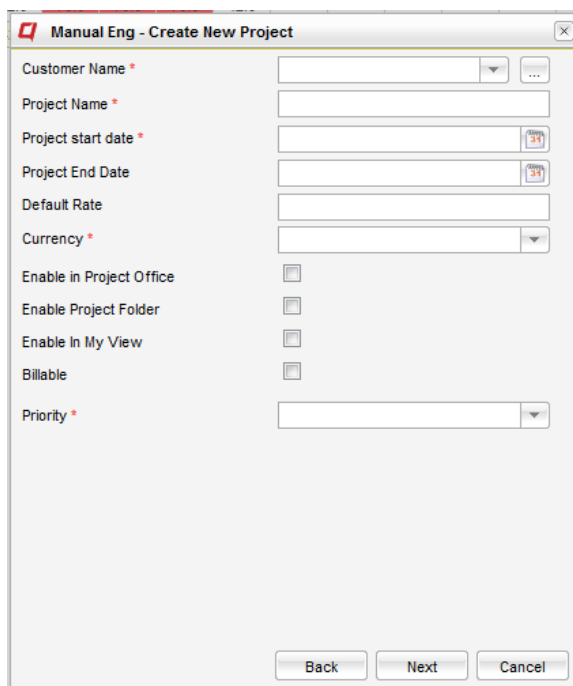
This function creates a new project manually or based upon an existing project.



A dialog box titled "Manual Eng - Add Project" with a close button (X) in the top right corner. It contains two radio button options: "Manually create project" (which is selected) and "Copy project". At the bottom right, there are two buttons: "Next" and "Cancel".

Add Project

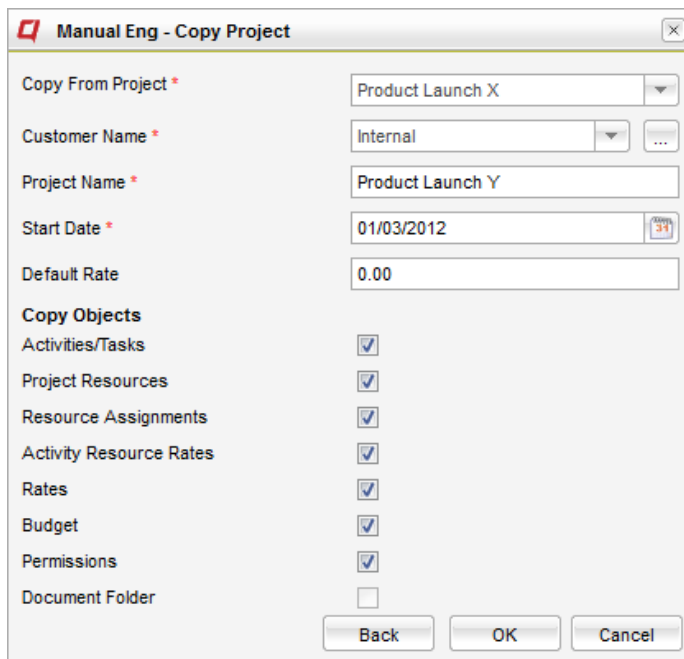
When the project is created manually, the creator will be asked to fill in the most important fields including all mandatory fields.



A dialog box titled "Manual Eng - Create New Project" with a close button (X) in the top right corner. It contains several input fields and checkboxes. The fields are: "Customer Name" (with a dropdown arrow and a search icon), "Project Name", "Project start date" (with a calendar icon), "Project End Date" (with a calendar icon), "Default Rate", "Currency" (with a dropdown arrow), "Enable in Project Office", "Enable Project Folder", "Enable In My View", "Billable", and "Priority" (with a dropdown arrow). The checkboxes are currently unchecked. At the bottom, there are three buttons: "Back", "Next", and "Cancel".

Create New Project Manually

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



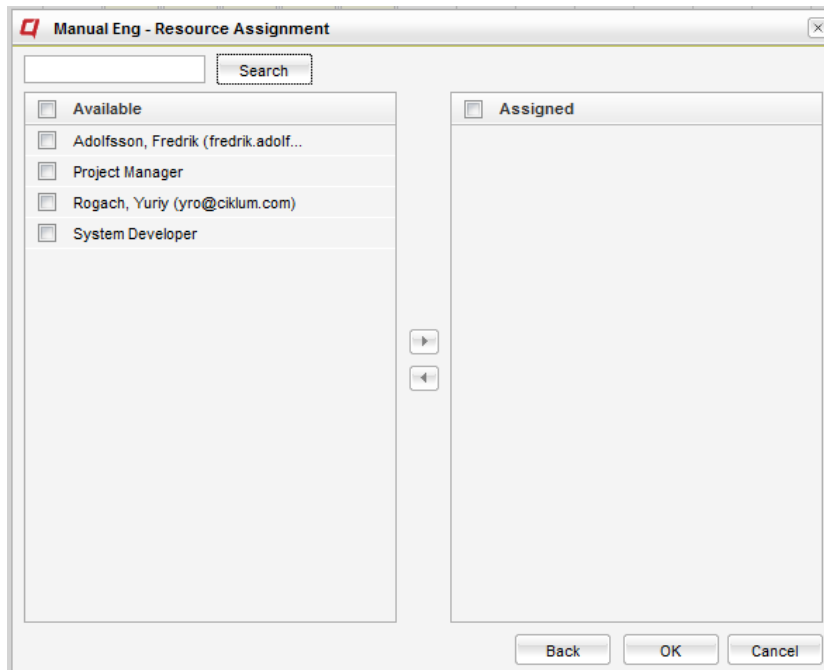
The dialog box is titled "Manual Eng - Copy Project". It contains the following fields and options:

- Copy From Project ***: A dropdown menu showing "Product Launch X".
- Customer Name ***: A dropdown menu showing "Internal" with a search icon.
- Project Name ***: A text field containing "Product Launch Y".
- Start Date ***: A date picker showing "01/03/2012".
- Default Rate**: A text field containing "0.00".
- Copy Objects**: A list of checkboxes:
 - Activities/Tasks: ☒
 - Project Resources: ☒
 - Resource Assignments: ☒
 - Activity Resource Rates: ☒
 - Rates: ☒
 - Budget: ☒
 - Permissions: ☒
 - Document Folder: ☐

At the bottom are three buttons: "Back", "OK", and "Cancel".

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.



The dialog box is titled "Manual Eng - Resource Assignment". It features a search bar at the top with a "Search" button. Below the search bar are two main panels:

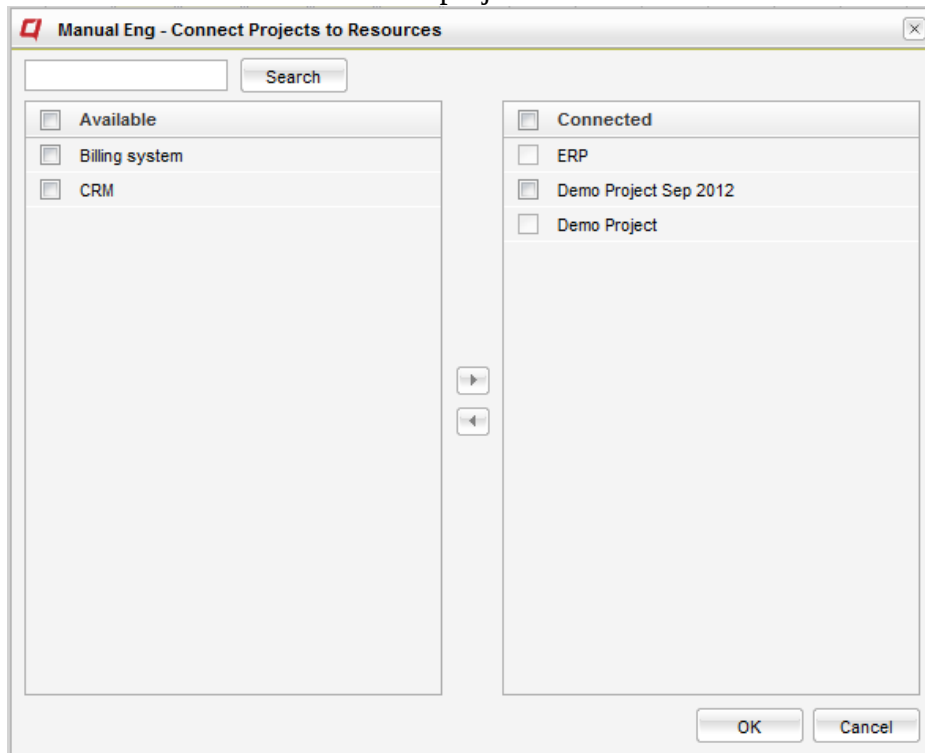
- Available**: A list of resources with checkboxes:
 - ☐ Adolfsson, Fredrik (fredrik.adolf...)
 - ☐ Project Manager
 - ☐ Rogach, Yuriy (yro@ciklum.com)
 - ☐ System Developer
- Assigned**: An empty list box for resources already assigned to the project.

Between the two panels are two arrow buttons: a right-pointing arrow (to move resources from Available to Assigned) and a left-pointing arrow (to move resources from Assigned back to Available). At the bottom are three buttons: "Back", "OK", and "Cancel".

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.

Send email

To... + Fredrik Adolfsson

Copy... +

Bcc... +

Subject * Resource booking

Message

Attachments:

Resource Booking.xlsx 7 KB

[Add from document archive](#)

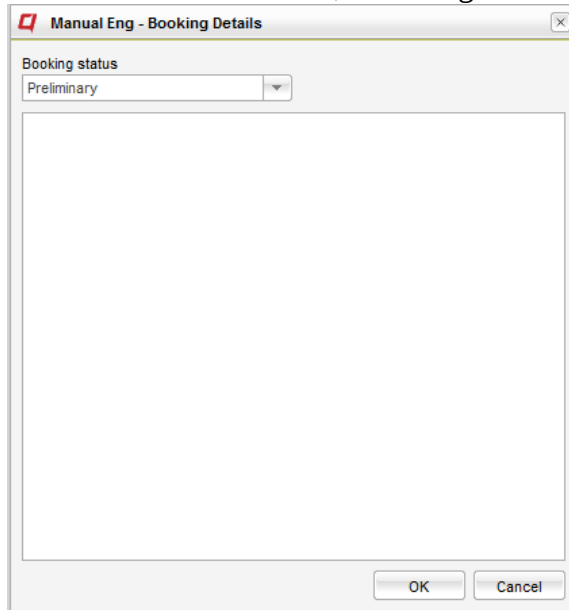
[Add from computer](#)

Send Close

E-mail from resource booking

Edit booking details

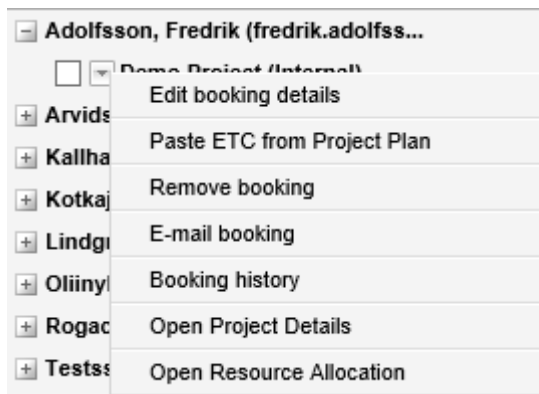
This function is used to change booking status and to write a booking comment. If the toolbar icon is chosen, the changes will affect all the marked resources.



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

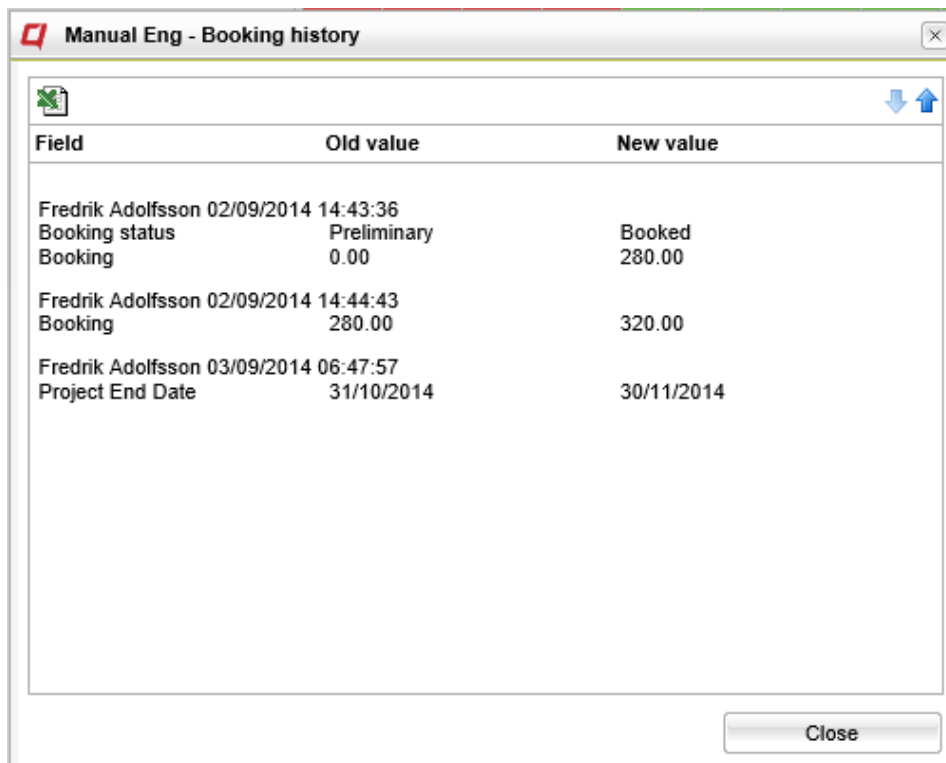
Booking history - See information below

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.



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

Booking history - Details

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.

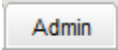
Process 1: the required person is *known* to the person creating the project plan

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.

Users and Groups	
Users	
Special Users	
Groups	
Import Users	
Export Users	
Workspace	
Account	
Settings	
Login Log	
API	
Import from other systems	
Projectplace	
Project Management	
Resources	⤴
Global Resources Details	
User Category Assignments	
Job Role Assignments	
Calendar	
Customers	
Categories	
Custom Fields	⤴
Project	
Activity and Issue	
Issue Type specific	
Risk	
Issue Web Forms	
UOM	
Currencies	
Risk parameters	
System options	

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.

Project Planning	Administrator	☒ Financial Information Access
Project Office	Administrator	
Time Reporting	Administrator	☒ People Resources Access ☒ Global Resources Access ☒ Project Resources Access ☒ Report Completed Access ☒ Admin Tab Access ☒ Search Tab Access ☒ Invoice Tabs Access
Issues	Standard access	
Risks	Standard access	
Reports	Standard access	
Resources	Standard access	

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	
☒ PUAAAdministration		
☒ 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.

Demo Project (2003)

Specify what permissions other groups and users have on this group. Read: Permission to see this group. Update: Permission to add and delete users from this group (also requires "Group Administrator" permission).

☐ Group / User	Full	Create	Read	Update	Delete
☐ All users	☐	☐	☐	☐	☐
☐ Demo Project (2003)	☐	☐	☒	☐	☐

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.

Project Management Parameters

Resource category:

Additional Resource Category 1:

Additional Resource Category 2:

Approver For

Group Name	Description
No records to display	

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.

Global Resources

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

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

Category
Fredriks res cat 3

Category Value	User
 fredrik res cat 1 value 1	 Adolfsson, Fredrik (fredrik.adolfsson@webforu...
 fredrik res cat 1 value 2	
 Standard	
 Standard 1	
 Standard 2	

Select Users Save Cancel

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

User Job Role

User
| Search

User	Job Role
 a_lastname, a_firstname (testing@test.com)	 Junior Designer
 Adolfsson, Fredrik (fredrik.adolfsson@webforu...	 Junior Developer
 Adolfsson, Fredrik Adu (fredrik.adolfsson@adu...	
 Adolfsson, Fredrik test (fredrik.adolfsson@te...	
 Anderson, Joe (joe.anderson@somecompany10.com...	
 Anderson, Joe (joe.anderson@somecompany.com)	
 Anka, Kalle (henrik.bech@webforum.com)	
 Arvidsson, Johan (johan.arvidsson@webforum.co...	
 Arvidsson, Johan 2 (jarvid@gmail.com)	
 Available, Available (mikael.hellstrom@webfor...	
 Available, Available	
 Available, Available	
 Available, Available	
 Avail-able, Avail-able	
 B, A (MaxFirstNameMaxFirstNameMaxFirstNa...	

1 2 3 4 5 6 7 8 9 10 ...

Select Job Roles Save Cancel

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

Base Pattern Exceptions

Calendar

	On	Off
Monday	☒	☐
Tuesday	☒	☐
Wednesday	☒	☐
Thursday	☒	☐
Friday	☒	☐
Saturday	☐	☒
Sunday	☐	☒
Standard hours	8.00	

Save Cancel

Calendar

Base Pattern Exceptions

Week 36, 31 Aug 2009 - 6 Sep 2009

Date	Day	On	Off	Hours	Description
31/08/2009	Monday	☒	☐	8	
01/09/2009	Tuesday	☒	☐	8	
02/09/2009	Wednesday	☒	☐	8	
03/09/2009	Thursday	☒	☐	8	
04/09/2009	Friday	☒	☐	8	
05/09/2009	Saturday	☐	☒	0	
06/09/2009	Sunday	☐	☒	0	

Save Cancel

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.

Base Pattern Exceptions Resource Mass change

Resource

Week 11, 15 Mar 2010 - 21 Mar 2010

Date	Day	On	Off	Hours	Description
15/03/2010	Monday	☒	☐	8	
16/03/2010	Tuesday	☐	☒	0	
17/03/2010	Wednesday	☐	☒	0	
18/03/2010	Thursday	☐	☒	0	
19/03/2010	Friday	☐	☒	0	
20/03/2010	Saturday	☐	☒	0	
21/03/2010	Sunday	☐	☒	0	

Save Cancel

Base Pattern Exceptions Resource Mass change

Resource

From Date To Date

	On	Off	Hours	Description
Monday	☒	☐	8	
Tuesday	☒	☐	8	
Wednesday	☒	☐	8	
Thursday	☒	☐	8	
Friday	☒	☐	8	
Saturday	☐	☒	0	
Sunday	☐	☒	0	

Save Cancel

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

Search [Advanced >>](#)

Keyword Active Search

☐	Customer Name	Number	Address	Phone	Fax	Ref Number	Description	Billable	Active
☐	A test customer	10038	Street 1	+46 8 527 40 70	+46 8 527 40040		Test customer	☐	☒
☐	A test customer 2	10039						☐	☒
☐	A test customer 3	10037						☐	☒

Delete New

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.

Customers

Search [Simple <<](#)

Customer Name Customer Number

Reference number Active

*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

Customer Name *	Customer Number	Ref Number
Food Corp	10004	
Address line 1	Address line 2	Address line 3
Postal Code	City	Country
Phone	Fax	Description

☒ Billable
 ☒ Active

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

Users and Groups	Categories
Users	
Special Users	
Groups	
Import Users	
Export Users	
Workspace	
Account	
Settings	
Login Log	
API	
Import from other systems	
Projectplace	
Project Management	
Resources	
Global Resources Details	
User Category Assignments	
Job Role Assignments	
Calendar	
Customers	
Categories	

Category	Object
Job Role	
Project Portfolio	
 Activity Categories	Activity
 Additional Activity Category 1	Activity
 Additional Activity Category 2	Activity
Issue Status	Issue
Issue Resolution	Issue
Issue Type	Issue
Issue Link Type	Issue
  Project Categories	Project
 Additional Project Category 1	Project
 Additional Project Category 2	Project
 Resource Categories	Resource
 Additional Resource Category 1	Resource
 Additional Resource Category 2	Resource
Risk types	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 Values (Project Categories)		
☐	Category Value	Description
☐	Pro Bono	Enabled ☒
☐	Standard Project	Enabled ☒

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 chosen a type, it cannot be changed to another type.

New custom field

Name *

Mandatory ☐

Searchable ☒

Type

- Text (single row)
- Text (multiple rows)
- Decimal number
- Integer
- Date
- Pick list (one choice)
- Pick list (one choice, categorized)**
- Pick list (multiple choice)
- User list (one choice)

OK Cancel

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.

New custom field

Name *

Mandatory ☐

Searchable ☒

Type

List values

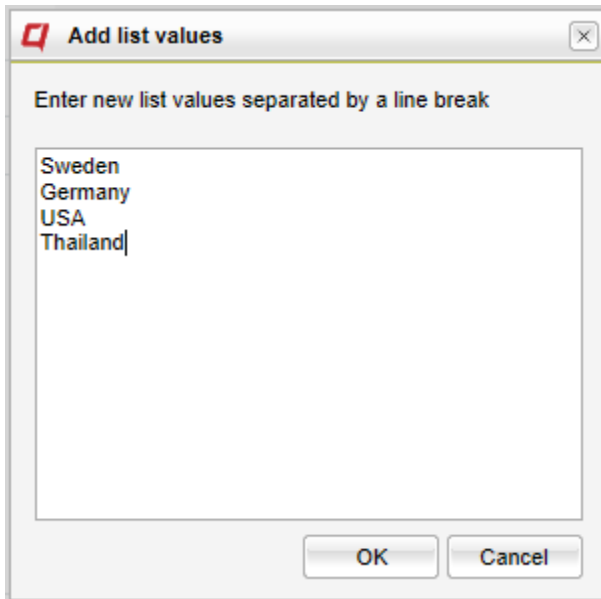
Pick List Name *

Description [Add](#)

[Delete](#) | [Add](#)

Pick lists

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



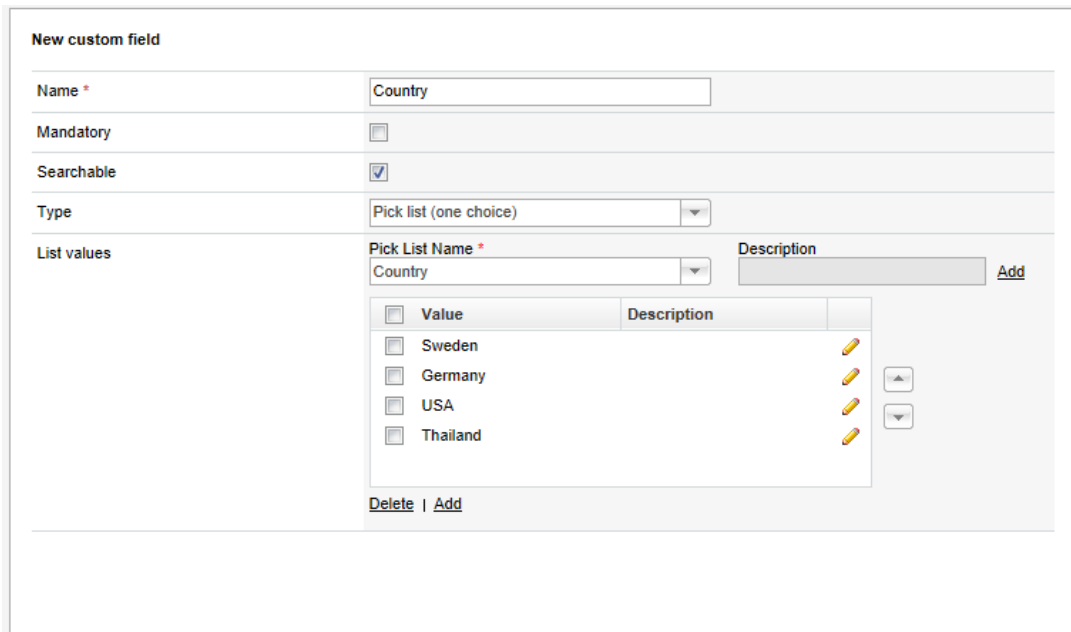
Add list values

Enter new list values separated by a line break

Sweden
Germany
USA
Thailand

OK Cancel

Add list values



New custom field

Name *	Country																
Mandatory	☐																
Searchable	☒																
Type	Pick list (one choice)																
List values	Pick List Name * Country Description Add <table border="1"> <thead> <tr> <th>Value</th> <th>Description</th> <th></th> </tr> </thead> <tbody> <tr> <td>☐ Sweden</td> <td></td> <td></td> </tr> <tr> <td>☐ Germany</td> <td></td> <td></td> </tr> <tr> <td>☐ USA</td> <td></td> <td></td> </tr> <tr> <td>☐ Thailand</td> <td></td> <td></td> </tr> </tbody> </table> Delete Add		Value	Description		☐ Sweden			☐ Germany			☐ USA			☐ Thailand		
Value	Description																
☐ Sweden																	
☐ Germany																	
☐ USA																	
☐ Thailand																	

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.

The screenshot shows the 'New custom field' form. The 'Name' field is set to 'Country'. The 'Mandatory' checkbox is unchecked, and the 'Searchable' checkbox is checked. The 'Type' is set to 'Pick list (one choice, categorized)'. Under 'List values', there is a 'Pick List Name' dropdown and a 'Description' field with an 'Add' button. Below this is a 'Category:' dropdown with a 'Manage categories' link. A large empty text area is provided for categories, with up and down arrow buttons on the right. At the bottom, there are links for 'Delete', 'Add', and 'Change categories for values'.

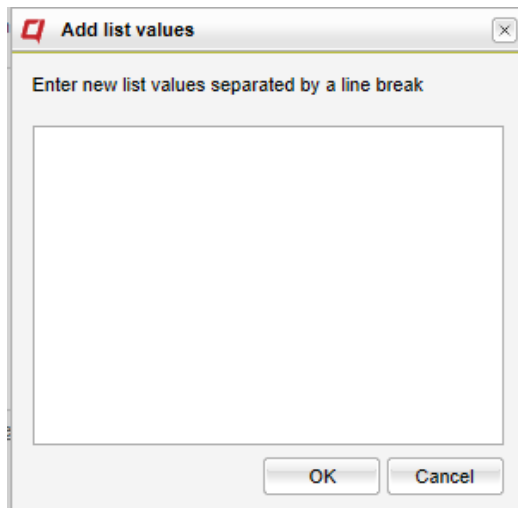
Categorized pick list

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.

The screenshot shows the 'Manage categories' dialog box. It has a title bar with a red icon and the text 'Manage categories'. Inside, there is a list of categories: Asia, EMEA, North America, South America, and Australia. Each category has a checkbox and a pencil icon to its right. To the right of the list are up and down arrow buttons. At the bottom left, there are links for 'Delete' and 'Add'. At the bottom right, there are 'OK' and 'Cancel' buttons.

Manage Categories



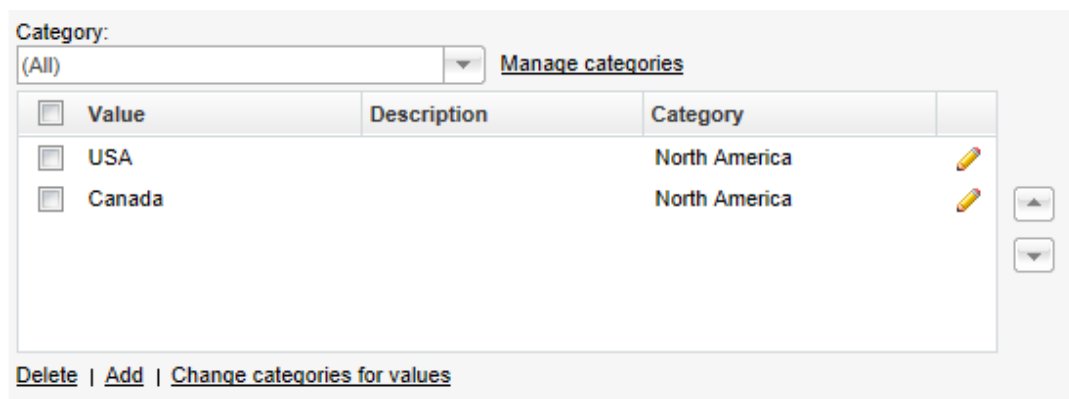
Add list values

Enter new list values separated by a line break

OK Cancel

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.

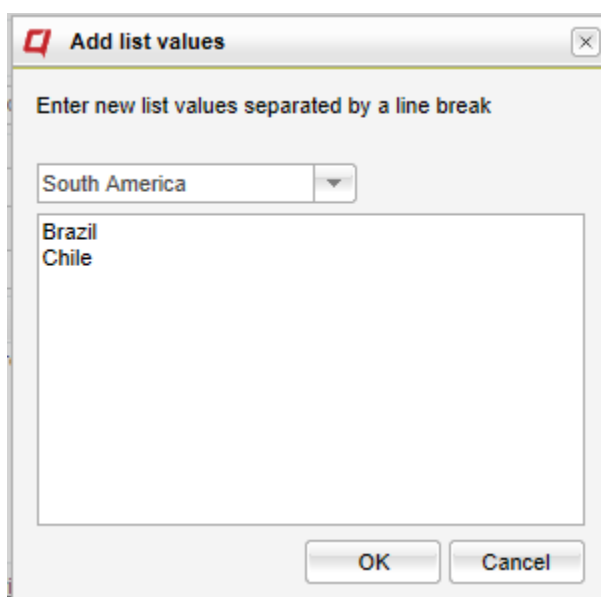


Category: (All) [Manage categories](#)

☐ Value	Description	Category	
☐ USA		North America	
☐ Canada		North America	

[Delete](#) | [Add](#) | [Change categories for values](#)

Categorized list values



Add list values

Enter new list values separated by a line break

South America

Brazil
Chile

OK Cancel

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.

Name	Type	Mandatory	Searchable
Found in release	Pick list (one choice)		✓
Fixed in version	Pick list (one choice)		✓

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.

Users and Groups		Issue Web Forms						
Users		Add form Copy Delete						
Special Users		☐	Name	Project	Issue Type	Active from	Active to	Created by
Groups		☐	Bug reporting ERP	ERP	Bug	27/11/2014	27/11/2015	Fredrik Adolfsson
Import Users								
Export Users								
Workspace								
Account								
Settings								
Login Log								
API								
Import from other systems								
Projectplace								
Project Management								
Resources								
Global Resources Details								
User Category Assignments								
Job Role Assignments								
Calendar								
Customers								
Categories								
Custom Fields								
Project								
Activity and Issue								
Issue Type specific								
Risk								
Issue Web Forms								

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

Issue Web Forms

Bug reporting ERP

Published ☒

Name *

Header *

Information

B *I* U A A A A A A

Here bugs related to the ERP system can be reported.

Project

Issue type

Form language

Active from * 19 ?

Active to * 19 ?

Expired message ?

Response text ?

Allow attachments ☒

Allow public access ☒

URL

Available fields	Data type
☐ Description	Text (multiple rows)
☐ Reporter	User list (one choice)
☐ Assigned To	User list (one choice)
☐ Is Time Report Enabled	Boolean
☐ Percent Complete	Integer
☐ Start Date	Date
☐ End Date	Date
☐ UOM	Pick list (one choice)
☐ Billable	Boolean
☐ Time Report From	Date
☐ Time Report to	Date
☐ Budget	Decimal number

Selected fields	Data type	Default value
☐ Name	Text (single row)	

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 clicking on an “info” symbol next to the published field.

Selected fields	Data type	Default value
☐ Reporter	User list (one choice)	

Manual Eng - Edit field

Field: Severity

Default value: 4 - Low

Information: Information text

OK Cancel

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 Measure

	UOM	Name
☐	Day	Day
☐	hr	Hour

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
			☒

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	

☐	Value	Consequence	Description
☐	1	Minor	
☐	2	Medium	
☐	3	Major	

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	EUR Euro	☐ Use in issues
First day of week	Monday	☐ Use in issues
Resource category	Employee res category	☐ Use in issues
Activity category	Standard services	
Category 1		
Category 2		
Project category	Standard project	
UOM	uah	
Page size *	20	
Use week number	☒	
Preliminary invoice	☒	
Time Report Approval Activated	☒	
Approver Allowed to Update Time Reports	☒	
ETC updateable in time report	☒	
Issue Type	Bug	
Issues Time Report Enabled	☒	
Resolution	Solved	
Allow workspace level issue import via e-mail	☒	

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.

Resource Booking Parameters

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

Resource Booking Parameters

Resource booking UOM

hr

Default booking status

Undefined

Booking Interval Colors

From 0 %

From 70 %

X

From 100 %

X

From 120 %

X

[Add level](#)

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.

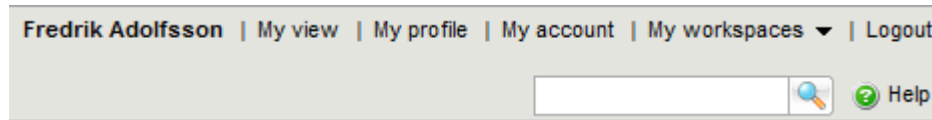
Additional Project Statuses		⌵
Time	*	✗
Budget	*	✗
Function	*	✗
Risk	*	✗
User defined status	*	✗

[Add Status](#)

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 personal 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/Activity	Start	End	Status	% Complete	Budget	Spent	ETC	UOM
Changes Since My Last Login	Test project XXX(Test Customer)								
Project activities	Test act 3	10/03/2010	24/03/2010		0 %	10.00	0.00	10.00	hr
Status Reports	Test Project YYY(Test Customer)								
	test act 2	09/03/2010	24/03/2010		0 %	10.00	0.00	10.00	hr

My View Project Activities

My View	Project / Date / Activity	Start	End	Status	% Complete	Comment
Changes Since My Last Login	Test project (FA test customer)					
Project activities	Test project XXX (Test Customer)					
Status Reports	12/03/2010					
	Testact 1	10/03/2010	24/03/2010	Not Started	0 %	
	Comment					
		Save				
	12/03/2010					
	Project_1 (Testers Inc.)					

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!

Webforum Europe AB

Solna Torg 19, 3tr
SE-171 45 SOLNA, Sweden

Switchboard/sales: +46 (0)8 527 400 70

Support: +46 (0)8 527 400 80

Fax: +46 (0)8 527 400 40

Internet: www.webforum.com

E-mail

General: info@webforum.com

Sales: sales@webforum.com

Support: support@webforum.com

Appendix 1 Mobile Interface

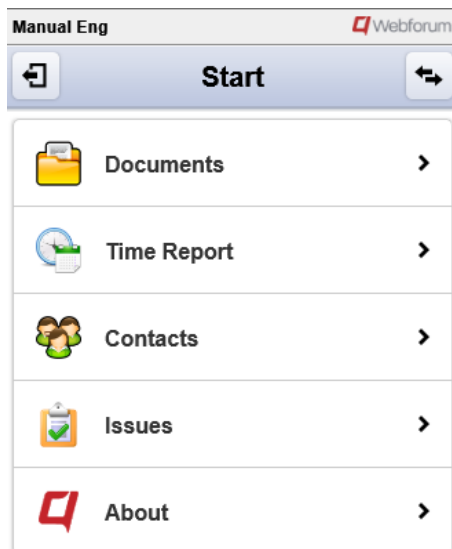
It is possible to login to a specified workspace via the mobile interface. The normal login page has the workspace URL/login as the address. The mobile login has the workspace URL/mlogin as the address. It is also possible to login from the URL m.webforum.com.

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 to 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	
Demo Project	
Demo Project Sep 2012	
ERP	✓
OK Cancel	

Add activities

Issue management

Click “Issues” to open the issue list in search mode.

ECM Test Platform 10001

Issues

+

List

Search

Include closed issues

No

▼

1222 - Problem with bugs in the interface

>

1221 - Problem with logging

>

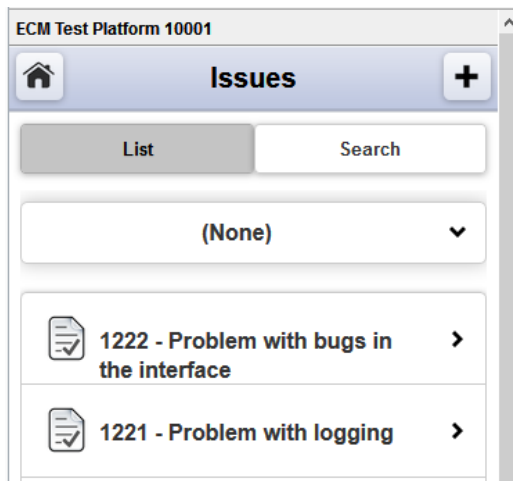
1220 - 1 file of 18 mb

>

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.

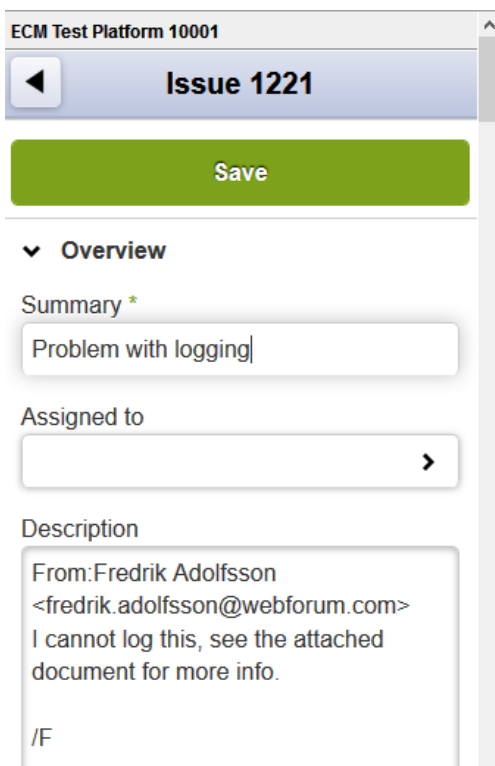
It is also possible to click ”List” to open the list view.



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

ECM Test Platform 10001

◀ **Issue 1221**

Save

➤ Overview

▼ **Categorization**

Project Name
Issue project

Reporter
Adolfsson, Fredrik (fredrik.adolf... ➤)

Issue Type *
Email ▼

Status *
New ▼

Categorization

ECM Test Platform 10001

◀ **Issue 1221**

Save

➤ Overview

➤ **Categorization**

▼ **More information**

Links **0**

Planned Start Date *
02/06/2014 📅

Planned End Date
02/06/2014 📅

Budget

More information

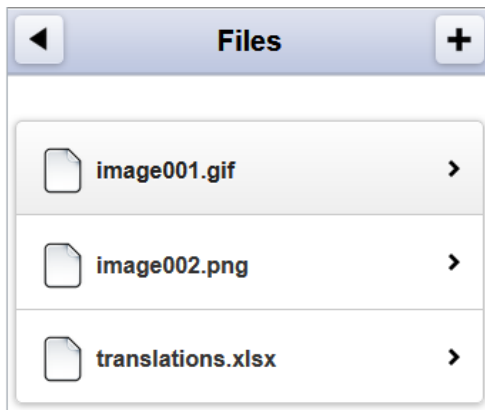
The “Overview” primarily contains fields related to the content of the issue, the “Categorization” contains the different flexible fields and “More information” primarily contains planning information.

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

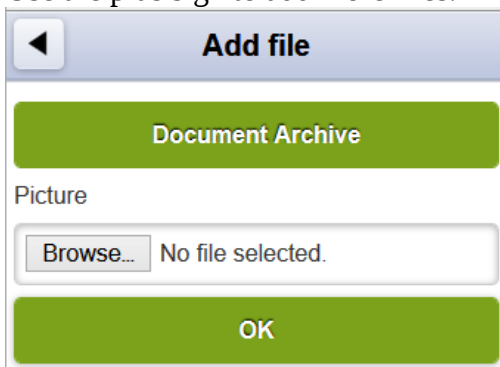
3

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
<u>Measures</u>		
	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
<u>Dimension Categories</u>		

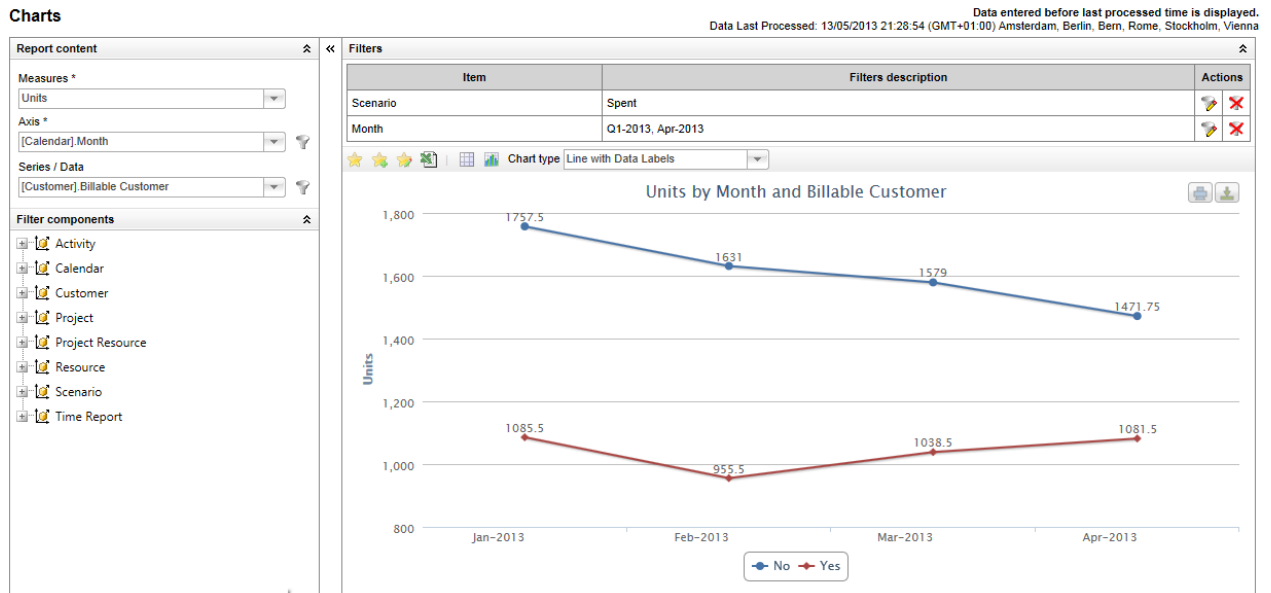
Category	Dimension/ Hierarchy levels	Description
Resource	Resource Categories	There is one standard resource category but it is possible to use other categories that the administrator has chosen to add to the system. There are three resource categories in total and each category can have an unlimited 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
	<i>Custom Fields</i>	Custom Fields marked as “Analyzable” will be displayed
Calendar	Date Month Quarter Week Year Year-Quarter- Month-Date 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. 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 (charts and analysis beta only)	Acc Current YTD	displays accumulated values for all periods up until the period displayed displays values for the period displayed (current is displayed by default if no Calendar Aggregation member is used in a filter) 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
	<i>Custom Fields</i>	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: Booking Baseline Budget Spent ETC Forecast	Gives a possibility to follow up units and amounts spent as well as the booking, baseline, budget, estimate to complete “ETC” and forecasts. As opposed to all other dimensions, the top level is not the sum of the lower levels in this dimension. 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. 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.

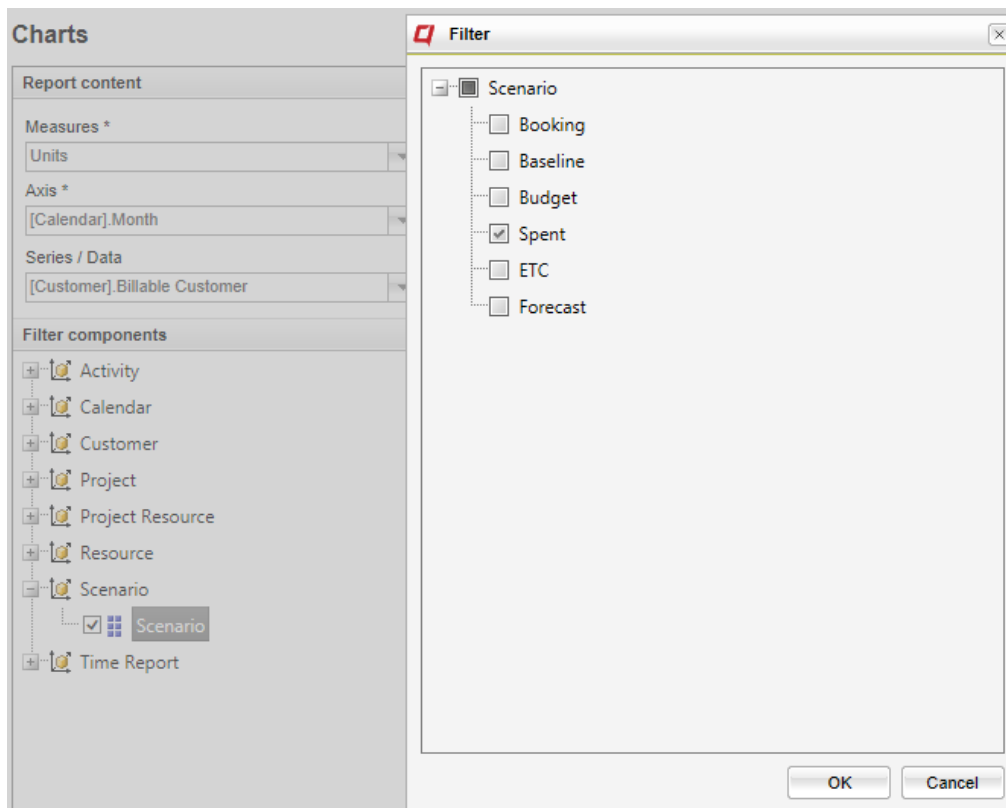
Filters

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.

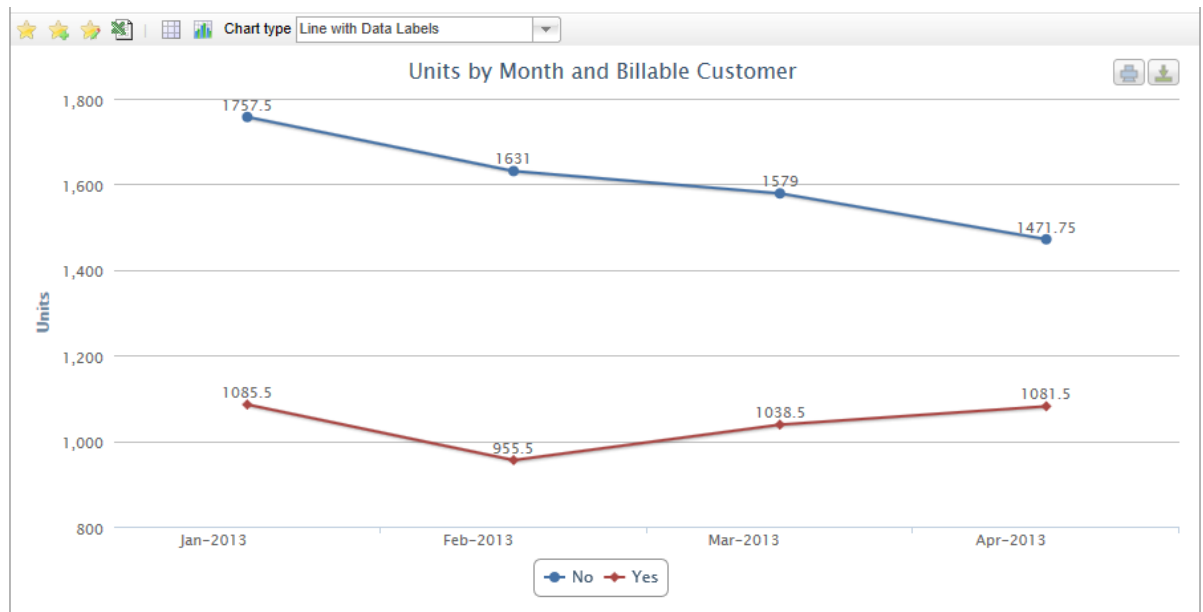


Chart mode

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						
Billable Customer	Units					
	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:

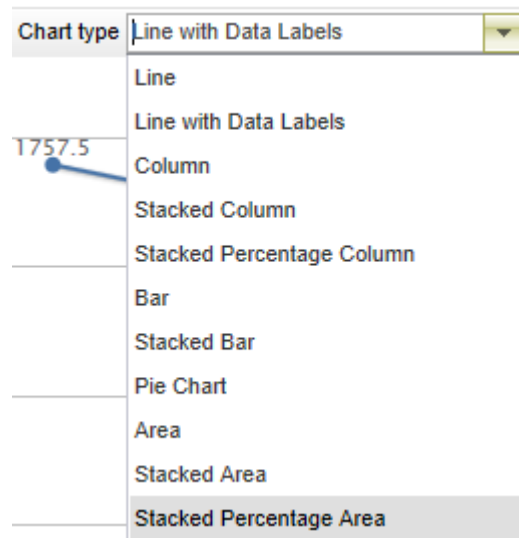


Chart types

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:

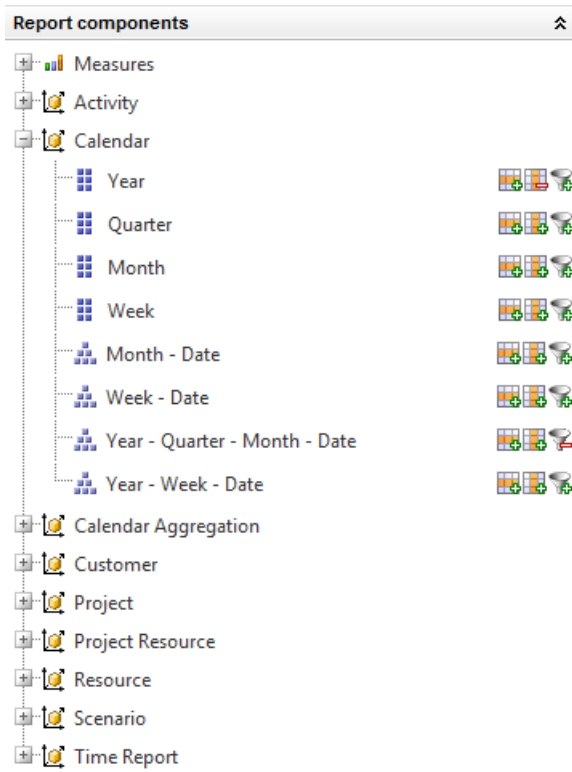
Year	2013			2013	Grand Total
Scenario	Budget	Spent	Forecast		
Activity Name					
Demo Project	24.00	24.00	48.00		48.00
Demo Project Sep 2012	10.00	10.00	20.00		20.00
ERP					
Pre-Study					
Activity 1	27.00	27.00	54.00		54.00
Activity 2	50.00		50.00		50.00
Pre-Study Total	50.00	27.00	27.00	104.00	104.00
Initiation	20.00	2.00	2.00	24.00	24.00
Implementation	20.00		20.00		20.00
ERP Total	90.00	29.00	29.00	148.00	148.00
Grand Total	90.00	63.00	63.00	216.00	216.00

Reports and Analysis screen layout

The screen consists of 5 major areas:

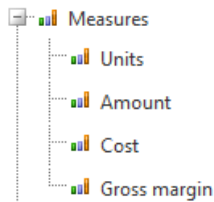
Area	Description
Values area	Items that you want to see as values in a report should be placed here by using drag&drop
Rows area	Items that you want to see as rows in a report should be placed here by using drag&drop
Columns area	Items that you want to see as columns in a report should be placed here 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  **Measures**. 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.

Analysis Charts Views Views Admin

Report content Save | Load

Values

Units

Columns

Scenario

Rows

Project Name

Filters

Scenario All elements except Booking, Baseline

Project Name All elements except Demo Project

Report components

Measures

- Units ☒
- Amount ☐
- Cost ☐
- Gross margin ☐

Activity

Calendar

Calendar Aggregation

Customer

Project

- Billable Project
- Currency Code
- Project Categories
- Additional Project Category 1
- Additional Project Category 2
- Project Name
- Project Manager
- Project Name
- Project Status

Project Resource

Resource

Scenario

Time Report

Scenario	Budget	Spent	ETC	Forecast	Grand Total
Project Name					
CRM	80.00	10.00	70.00	80.00	240.00
Demo Project Sep 2012	300.00	12.00	285.00	297.00	894.00
ERP	240.00	29.00	117.00	146.00	532.00
Grand Total	620.00	51.00	472.00	523.00	1,666.00

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.

Resource Name



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.

[-] 2012
[+] Q1-2012
[+] Q3-2012
[+] Q4-2012

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:

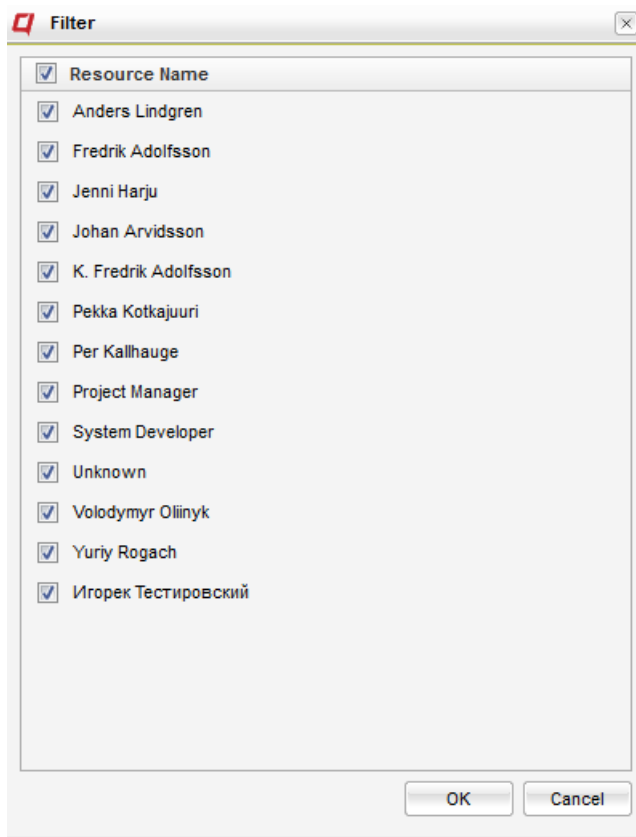
[-] 2012

Filtering

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

Resource Name





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:

▼ Per Kallhauge
[-] Demo Project
[-] Activity 1
Task 1.1
Activity 1 Total
Activity 2
Demo Project Total
[-] ERP
Initiation
ERP Total
Per Kallhauge Total

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 do 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.

Report content	Save Load
----------------	---

Analysis Charts Views Views Admin

Report content [Save](#) | [Load](#)

Values

Units

Columns

Year - Quarter - Month - Date

Rows

Scenario

Project Name

Filters

Year - Quarter - M... 2013

Scenario All elements except Booking, Baseline

Report components

Measures

Units

Amount

Cost

Year

Scenario

> Budget

> Spent

> Forecast

Grand Total

2013

Grand Total

90.00

90.00

63.00

63.00

63.00

63.00

216.00

216.00

Save report

Name

Public report

OK

Cancel

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 criteria, 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.