



TeamWorks R3.4 Release Notes – March 2010

TeamWorks R3.4 – release notes

About the release notes

The release notes are a comprehensive guide to the latest release of TeamWorks.

What's included in the release notes

For every major enhancement, the release notes provide:

- A brief, high-level description of the functionality.
- Tips to help you get started with the feature.

Beyond the major new enhancements, the **other enhancements** section includes a list and brief description of every other enhancement or functional change included in the release.

Major enhancements

Project binder

Available in: TeamWorks Professional and TeamWorks Enterprise

Type: Feature

Release 3.4 of TeamWorks introduces a new project binder. Previously to review or update a project it was necessary to visit various pages within the application. Now all the key information for a project is held together in a single area.

The project binder also introduces new features for status reporting and additional project centric information about project finances, resources and timesheets.

Opening the project binder

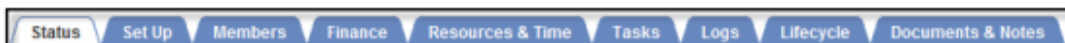
The project binder is opened from the project lists using the **binder / edit** option. Depending on your rights in TeamWorks, the binder you open and the actions you can perform in the binder differ.

A dashboard user can access the binder by clicking a project in the dashboard views.



Navigating the project binder

The project binder has a set of top tabs that are used for navigating the binder. A series of side tabs are also available within in each top tab.



Resource planner

Available in: TeamWorks Professional and TeamWorks Enterprise

Type: Feature

The resource planner introduces an alternative way to schedule tasks for resources. It is a resource centric way to schedule tasks for resources across a range of projects. Compare this to the Gantt planner which allows you to schedule tasks for a specific project.

Resource planner considerations

- Normally used for scheduling ad-hoc work, business as usual work or simple projects.
- Ideal for scheduling engineers or consultants onto jobs.

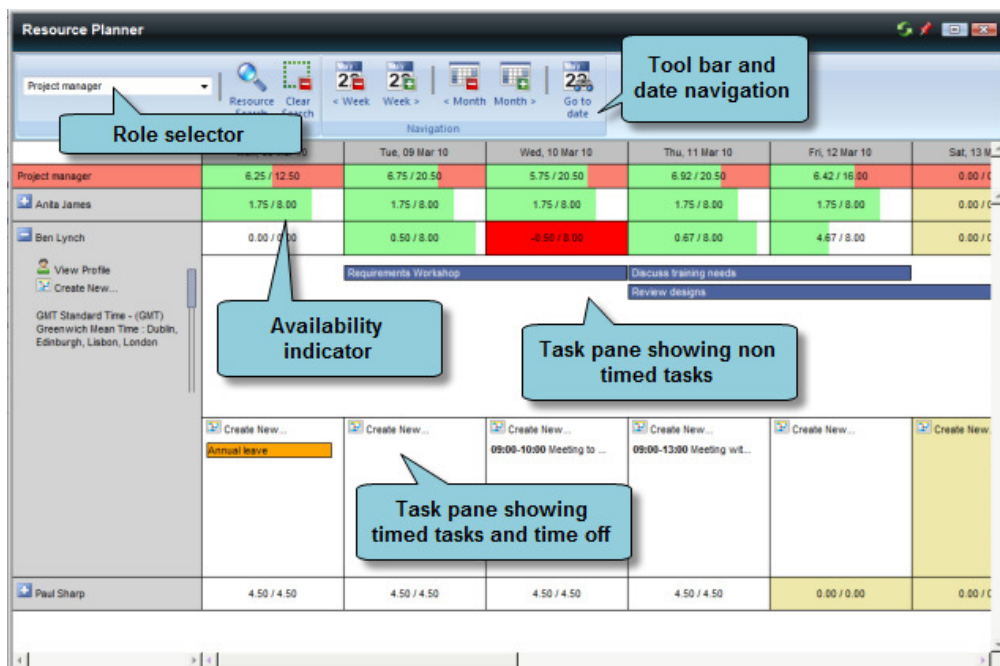
- Schedule resources across many projects at the same time.
- Tasks can only have a single assignee.
- Scheduling options are restricted to starting and finishing tasks on given days.
- Tasks can be given start and end times if created as timed tasks.

Schedule using option

When you create a project you now have a **schedule using** option which can be set to **resource planner** or **Gantt chart**. Only projects set to **resource planner** can have tasks created for them on the resource planner. Only projects set to **Gantt chart** can be updated via the TeamWorks Gantt chart or MS Project Connector.

Existing TeamWorks concepts such as timesheets, utilisation reporting and the finance model operate with the resource planner.

Resource planner overview



Internet Explorer 8 compatibility

Available in: TeamWorks Professional and TeamWorks Enterprise

Type: Feature

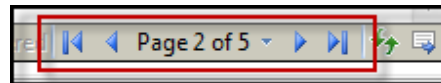
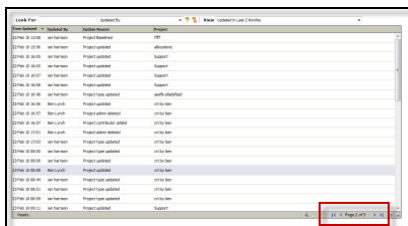
Release 3.4 of TeamWorks is now natively compatible with IE8. IE7 can also be used.

New paging mechanism

Available in: TeamWorks Professional and TeamWorks Enterprise
Type: Feature

The way you navigate between pages of data records has been changed to a page by page mechanism. The paging control is found at the bottom right of the data grids. Options are available for **first page**, **last page**, **previous page**, **next page** and **go to a page**.

Using the option at **personalise | accessibility | page size** users can control how many rows appear on a grid by default. Exporting the grid still exports all records in the grid (i.e. you don't have to export page by page).

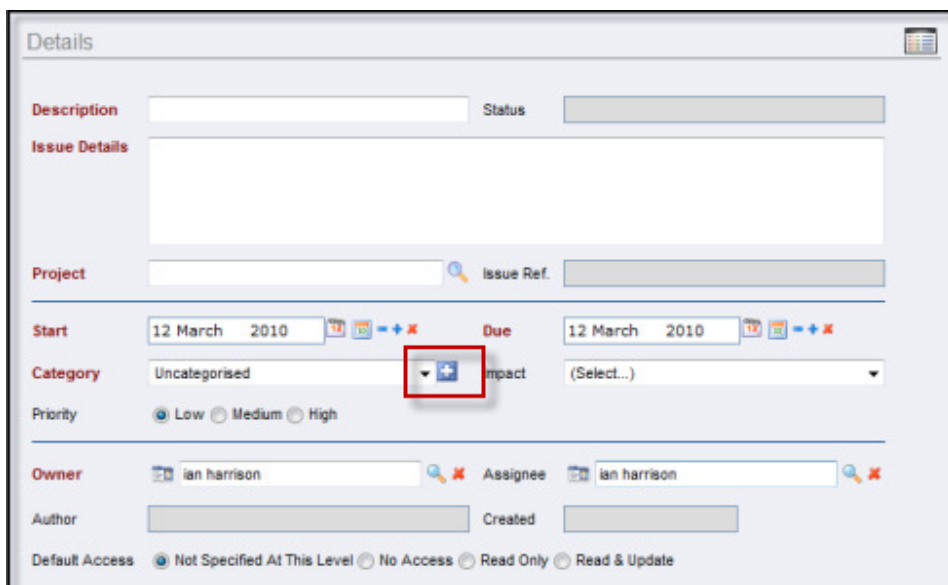


Create pick list (lookup) data from application pages

Available in: TeamWorks Professional and TeamWorks Enterprise
Type: Feature

If you have administrative rights to TeamWorks you can now create pick list (lookup) values direct from application forms (for example add issue, edit project) using the + icon when available.

Previously you had to navigate to the set up area to create application pick list values.



Improved dashboard filtering

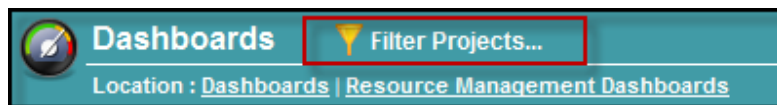
Available in: TeamWorks Professional and TeamWorks Enterprise

Type: Feature

Filtering of projects in dashboards is now performed using a tree view concept. This provides a quicker and more granular way to filter your dashboard data.

Opening the dashboard filter

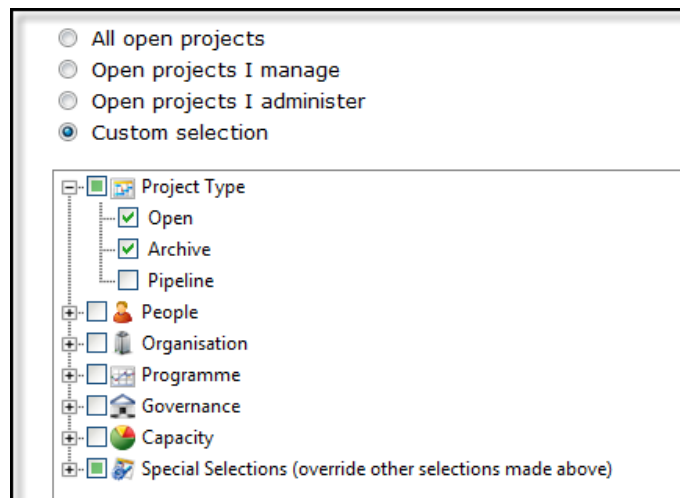
A new option is provided at the top of the dashboards to open the dashboard filter.



Using the dashboard filter

The dashboard filter consists of a set of pre-defined selections plus a custom selection. Filtering persists across dashboards and also is remembered when you next login to TeamWorks.

Users can also share their dashboard filter settings.



New status report options and reported fields

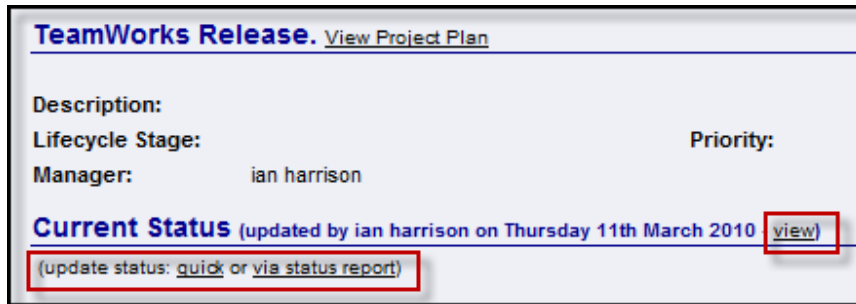
Available in: TeamWorks Professional and TeamWorks Enterprise

Type: Feature

Previously if a project manager wanted to report a status update for their project (i.e. current stage, RAG status, forecast days and forecast costs) they had to produce a full status report.

The new release introduces a **quick update** option for project managers reporting project status.

Both full status reports and quick updates can be created via the new project binder home page.



Project state permissions

Available in: TeamWorks Professional and TeamWorks Enterprise

Type: Feature

Administrators now have an enhanced set of permissions they can apply to users to control who can change the state of projects (i.e. who can “archive” projects, “delete” projects etc.).

These permissions are set against the user record. These permissions do not override permissions inherited from the license class. For example giving a user with a “**user**” license class permission to “delete” projects will not provide them with this right as their license class prevents this action.

Consideration

We suggest you review your permissions post upgrade for users and refine if required.

Remember filter settings

Available in: TeamWorks Professional and TeamWorks Enterprise

Type: Feature

Previously filter settings on list pages were not remembered (they returned to system the default). This meant that users had to keep changing their filter settings to the desired values. Filter settings are now remembered.

Dashboard users and project roles

Available in: TeamWorks Professional and TeamWorks Enterprise

Type: Feature

Before release 3.4 a dashboard user needed a role of at least contributor on a project to be able to view the project data in their dashboard. This is no longer the case. If a dashboard user views their dashboards, they will see all project data (based on the filters they have applied).

Forecasted fields

Available in: TeamWorks Professional and TeamWorks Enterprise

Type: Feature

This feature ties in with the status report feature above. TeamWorks introduces a stronger concept of **project manager forecasts values** (i.e. project managers current expectation of costs and days remaining) and **planned values** (based on current plan). These forecast values are reported via the **status report** or **quick update** and appear in the binder. This means that a project manager does not require a fully developed plan to provide forecast cost and day information.

Resource management data extracts

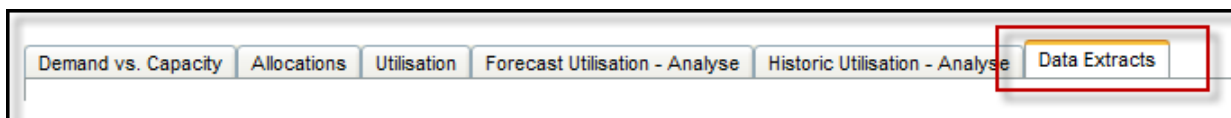
Available in: TeamWorks Professional and TeamWorks Enterprise

Type: Feature

A series of new data extracts over resource management data are now provided in the resource management dashboards. *The data extracts respect the filter settings in the dashboards, so if you have filtered your dashboards, the data in the extracts will be filtered also.*

Accessing the extracts

A new tab is provided in the resource management dashboards. Access to these options is granted in the same way as existing report and extract access is granted (i.e. via the manage reports option in **set up | reporting**).



Web services

Available in: TeamWorks Professional and TeamWorks Enterprise

Type: Feature

Additional web services added and existing web services updated.

Change requests

Available in: TeamWorks Professional and TeamWorks Enterprise

Type: Feature

You can now store change requests within TeamWorks. Change requests are used to track changes to your projects or requests for work.

Change requests are split into a **request** and a **response** element. You can control which users can **create requests** and **edit requests and responses** using the new permission options against a user account.

Accessing change requests

A new option has been added to the **projects** side tab called **change requests**. You can also access change requests from within the project binder.

Change request set up

Options to set up pick lists values for change requests are available in the **set up** side tab.

Delete project bypassing integrity checks

Available in: TeamWorks Professional and TeamWorks Enterprise

Type: Feature

Prior to R3.4 it was not possible to delete projects for integrity purposes once they had certain activity undertaken on them.

This release introduces an option that is only available to TeamWorks company administrators (i.e. the single admin account for your TeamWorks instance) and allows projects to be **force deleted**. Any project force deleted is placed in the recycle bin. The force delete option bypasses the normal TeamWorks integrity checks.

The option can be found at **set up | project, programme and lifecycle processes | administrators project delete**.

Other enhancements and changes

Change	Details	Type
Allocations are now added as active in the allocations editor.		Bug
Minor changes to messages in allocations editor.		Feature
New MS Project Connector version to correct minor issues.	Note, you must deploy this to users who use this feature as part of the upgrade.	Feature
Minor formatting changes to detail pages.		Feature
Contributors are now copied down from project templates.		Feature
Copy hierarchy from template. Corrected occasional bug that prevented hierarchies from copying correctly.		Bug
New project extract report.	Found at reports data extracts projects extract.	Feature
Help re-organised into main help and administrator help sections.		Feature
JavaScript error in utilisation viewer when using buttons.		Bug
Organisation portal not using dashboard filter project list.		Bug
Change of chart scale in Gantt prompts user to open for edit.		Bug

Known issues

None.