Visual Boards

Quick Guide

INNHOLD

1 INTRODUCTION

1.1 General

Using Visual Boards will improve your planning and construction processes, lead to more efficient meetings and secure a higher degree of involvement from all parties.

By digitalising your planning processes using Visual Boards, you will
- Obtain a common view of what to deliver
- Save time and cost through better overview and control
- Involve all participants before, during and after meetings
- Work together in a visual way
- Identify problems earlier and solve them as a team
- Have support for VDC/ICE methodologies
- Experience shorter construction time, higher quality and fewer mistakes
- Reduce time-consuming, administrative tasks
- Have no need for minutes of meetings

However you want to run Visual Boards, the graphicness, availability and transparency is immediate for all participants.

1.2 Visual Boards features

With this quick guide to Visual Boards, you will know how to create a new board, administer visual boards and how to use them.

The following features are available:

- **Question board**
  Create questions and address recipients supported by an approval process.

- **Week view**
  Main view containing milestones, deliveries and questions supporting your planning meetings

- **Decision log**
  Contains all approved questions.

- **Milestone list**
  Lists all milestones.

- **Question list**
  Lists all questions across all workflow steps.

- **Delivery list**
  Lists all deliveries

2 WHAT IS THE OVERALL PROCESS FOR MANAGING VISUAL BOARDS?

The process of creating, configuring, using and maintaining Visual Boards (VB), consists of the following steps:
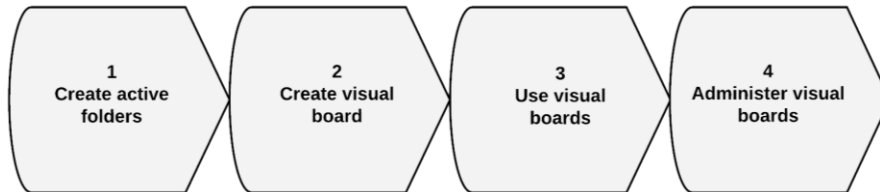
The following sub-chapters briefly outlines necessary actions. Subsequent main chapters describes these actions in more detail.

2.1 Create active folders

When creating active folders, you first have to

- Launch the Interaxo client
- Login as the Room Administrator
- Navigate to the desired location

2.1.1 Create active folder with workflow for the question board

An *Active Folder with Workflow* constitutes the basis for the Question Board in the Visual Boards client. Perform the following steps to create the active folder:

- Create a new Active Folder with Workflow
- Add and configure necessary fields
- Add and configure desired workflow steps

2.1.2 Create active folders for milestones and deliveries

Create the folders by performing the following steps:

- Create at least one active folder (without workflow) for milestones
- Create max one active folder (without workflow) for deliveries
- Add and configure necessary fields in all folders

2.2 Create visual board

Having the Active Folder with Workflow as the starting point, perform the following steps to create your Visual Board:

- Launch the Interaxo Administration client
- Navigate to the Room in question if needed
- Select the Groups main menu item
- Click the *CREATE GROUP* button in order to add necessary *From*- and *To* disciplines / organizational units
- Select the *Visual Boards* main menu item
- Click the *ADD BOARD* button and complete the creation wizard

2.3 Use visual boards

Once created, Visual Boards are available by logging in to the Visual Boards client. In this client you are able to

- Select the Visual Board you want to work with
- Use the following lists and views:

    - ✓ Question board view
    - ✓ Weekly view
    - ✓ Decision log list
    - ✓ Milestone list
    - ✓ Question list
    - ✓ Delivery list

- View milestones, questions and deliveries
- Create new objects
- Move questions and deliveries to other disciplines, time periods and workflow steps
- View / add comments and attachments to any object

2.4 Administer visual boards

Administering a Visual Board mainly involves the ability to

- conduct folder configurations
- mapping custom fields
- removing or replacing milestone and delivery folders and
- adding additional milestone folders

3 HOW DO I CREATE AN ACTIVE FOLDER WITH WORKFLOW?

The Active Folder with Workflow has to be configured to meet the requirements of the Question board.

As a minimum, the folder definition should include:

- A descriptive name
- Necessary custom field definitions to support the Question board fields
- A minimum of 2 workflow steps

In addition, you may create active folders for milestones and deliveries. You can have only one delivery folder within a Visual Board, but multiple milestone folders. Milestone folder may be added to more than one Visual Board.

3.1 Procedure for creating an Active Folder with Workflow

Perform the following steps to create the Question folder:

- Launch the Interaxo client
- Login as the Room Administrator
- Navigate to the desired location and click the *New… > Folder > Active folder with workflow* button
- On the *General* tab, name the folder
- Select the *Fields* tab and add/configure the following custom fields:
    - ✓ *Question* (Plain text, mandatory)
    - ✓ *From*-discipline (Member list, mandatory)
    - ✓ *To*-discipline (Member list)
    - ✓ *Deadline* (Date)
    - ✓ *Answer* (Plain text, optional)
    - ✓ *Answered date*

Remember that *From-* and *To-* disciplines have to be of type *Member List* in order to utilize the groups that have been created for organizational units and disciplines:

NOTE: *The field defined as the entry title will be the field who's value will be shown when opening folders in the different grid views in the Visual Boards client.*

- Configure necessary workflow steps in order to have containers for

  - ✓ The initial step (new questions, required)
  - ✓ Decision log step (required)

  In addition to other steps for supporting the business process (optional)

- Remember to *Save* all settings

3.2 Procedure for creating active folders for milestones and deliveries

Perform the following steps to create milestone- and delivery folders:

- Launch the Interaxo client
- Login as the Room Administrator
- Navigate to the desired location and click the *New… > Folder > Active folder* button
- On the *General* tab, name the folder
- Select the *Fields* tab and add/configure all necessary custom fields

3.2.1 Custom fields for milestone folders

As a minimum, the following fields should be defined:

- *Milestone* (Plain text, mandatory)
- *Planned date*
- *Met date*

3.2.2 Custom fields for the delivery folder

As a minimum, the following fields should be defined:

- *Delivery* (Plain text, mandatory)
- *Discipline* (Member list)
- *Planned delivery date*
- *Actual delivery date*

4 HOW DO I CREATE A NEW BOARD?

Creating a new Visual Board is done using the *Administration client* by navigating to the Room in question. Two main operations need to be performed before users can start using the new board:

- Create groups for organizational units and disciplines
- Create the new Visual Board

4.1 Create groups

Groups are created and populated with members by performing the following actions:

- Select the *Groups* main menu option
- If some groups are missing, add them by clicking the *CREATE GROUP* button
- Complete *Group settings*
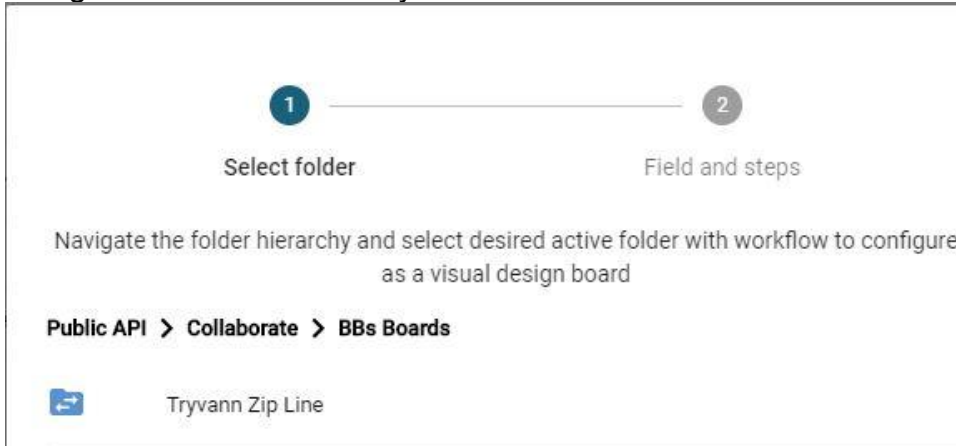
- Select *Group members*

- Click the *SUBMIT* button to save the (new) Group

4.2 Create a new Visual Board

Log in to the Interaxo Administration client and navigate to the desired Room. Select the *Visual Boards* main menu option and

- Click the *NEW BOARD* button
- Navigate the folder hierarchy and select the active folder with workflow in question

- Click *NEXT* button to

A) Configure fields:
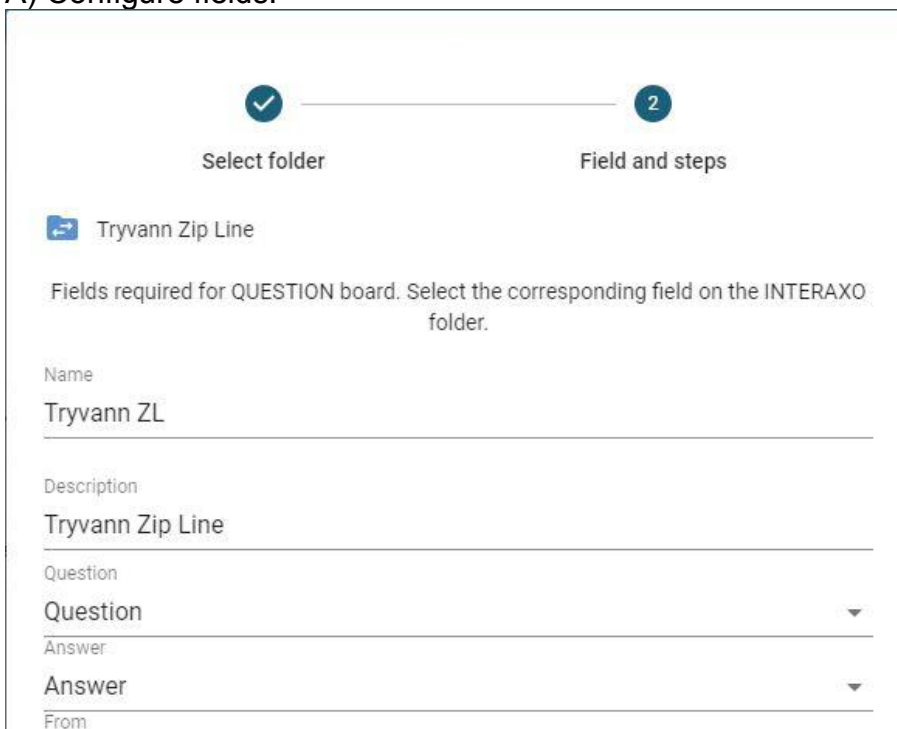
- Map custom fields defined for the Active Folder with Workflow to the following drop-down controls:

    - *Question*
    - *Answer*
    - *From* -discipline
    - *To* -discipline
    - *Deadline*
    - *Date answered* (optional, but recommended)

B) Map workflow steps for *Initial* and the *Decision log* steps:

Step configuration. Which step in the INTERAXO folder are the questions created it, and which step are marked as the 'Decision log'
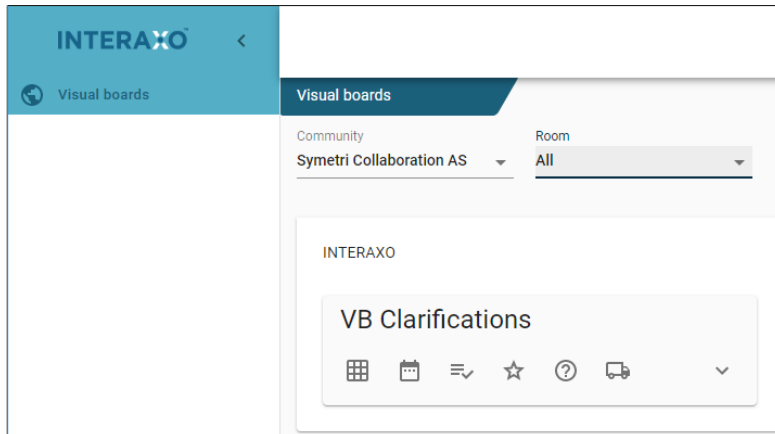
Initial / Question step

New questions ▼

Decision log

Approved ▼

- Click the *SUBMIT* button to complete the operation

5   HOW DO I USE THE VISUAL BOARDS CLIENT?

5.1 General

Initiate the Visual Boards client and you will be presented the list of all available Boards:

5.1.1   What are the main user interface parts of the Visual Boards client?

The Visual Boards client contains the following elements:

- **The top pane**
  - ✓ Lists the current selected Board
  - ✓ The user icon to the right shows the logged in user and the Logout button
  - ✓ The question mark icon initiates the Interaxo Help Center in a new tab

- **The main menu pane**
  Main menu options are listed in the menu pane to the left.

  The menu pane can be collapsed by clicking the left arrow at the top of the pane:

  Expand the pane by clicking the menu icon in the top pane:

By selecting a visual board, you can select from the following main menu options:

Visual boards	List all available boards
Question board	Open the Question grid
Week view	Open the Weekly view grid
Decision log	List all finalized questions
Milestone list view	List all milestones
Question list view	List all questions in all steps
Delivery list view	List all deliveries
Open Interaxo	Open the Interaxo client in a new tab

- **The content pane**
  This pane presents the information, e.g. the *Question board*, *Week view* etc.

5.1.2 How do I access the Visual Boards client from Interaxo?
The VB client can be initiated in 2 ways by:

- selecting *Open in new tab* from the *Visual boards* main menu item
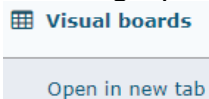
- clicking the *Visual board* button from the corresponding workflow folder:
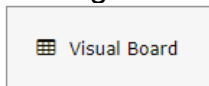
5.1.3 How do I access Interaxo from the Visual Boards client?
Click the *Open Interaxo* main menu option to open the Interaxo client in a new tab:
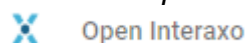
5.2 The Question board

5.2.1 General
Click the *Question board* menu option to see a grid listing all questions:

The *Question board* grid contains all uncompleted questions in a table where the corresponding Y / X axes reprensent *from-* and *to-*disciplines.

The *Unassigned* column represents questions not yet assigned any *To-*disciplines

On the right-hand side of the content pane all workflow steps are listed, showing contained questions. *Decision log* box will always show the folder icon with the total number of questions inside (since it will contain a high number of questions as the project progresses). By clicking it, the *Decision log* list view is presented.

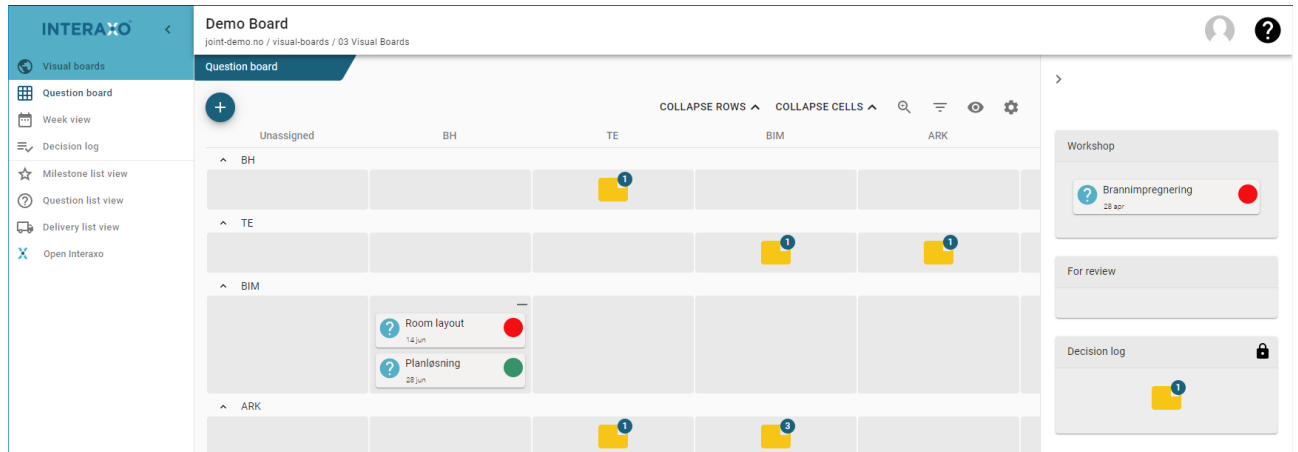### 5.2.2 What can I do in the Question board?
- **Click a folder icon** in the grid's cells to open it and list all questions inside
- **Mouse-over** a question to see a tool-tip containing essential custom field values
- **Click** a question to open its question card in the content pane
- **Drag & drop** a question to any other **cell** in the grid
- **Drag & drop** a question between workflow **steps**

Options in the tool bar:
- Click the **+** icon to create a new question
- Click the **COLLAPSE/EXPAND ROWS** button to hide/show all rows
- Click the **COLLAPSE/EXPAND CELLS** button to close/open cell objects
- Click the **magnifying glass icon** to activate high contrast and increased text size
- Click the **Filter** icon to select which disciplines to show and filter on custom field values
- Click the **Subscription** icon to subscribe to changes to the Question folder
- Click the **Settings** icon to select desired *Card titles*
  Note: *The default card title value is determined by the entry title definition in the underlying folders*

5.2.3 How do I create a new question?

- From the Question board, click the + icon and complete the Question Card
- Whether a field is mandatory or not is dependent on the configuration made to the mapped custom field in the underlying question folder.
  The following fields are mandatory:
  - ✓ Question
  - ✓ From-discipline

- Click the *SAVE* button to create the question, thus making it appear in the grid

5.2.4 How do I move a question?

Questions can be moved from their current location in 2 ways:

- **From one cell to another in the grid**

  - ✓ Either, drag and drop the question to another cell, or
  - ✓ Open the question card and select new values for *From-* and/or *To-* disciplines

- **To another workflow step**

  - ✓ Drag & drop the question to the desired step, or
  - ✓ Open the question card and select the new step from the *Move to* section:

5.2.5 How can I add and remove attachments to/from a question?
Add attachments:

- Open the Question card
- In the *Attachments* section, click the ADD ATTACHMENT button
- Select a file from the file system and click *Open* (Windows Explorer)
  OR
- Drag-and-drop a file from the file system to the grid part of the *Attachments* section

Remove attachments:

- Open the Question card
- Click the Trash Can icon for the attachment in question

  🗑

- Confirm deletion by clicking the *DELETE* button

5.2.6　How can I add comments to a question?

- Open the Question Card
- In the *Comments* section, compose your comment and click on the ADD button:

  Note: The circled number shows the total number of comments for this question
  *Once added, comments can **NOT** be deleted.*

5.3　The Week view
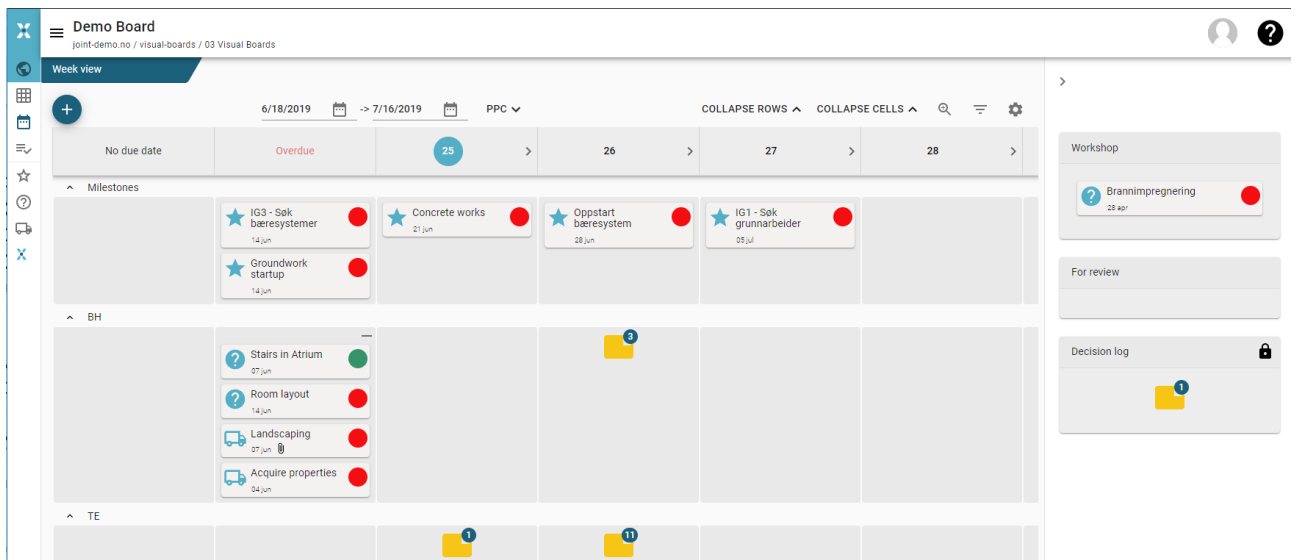
5.3.1　General

Click the *Week view* main menu option to see milestones, questions and deliveries in a grid where the X axis is a timeline with weeks as the time unit:

- The Weekly View grid shows the timeline on the X axis and the disciplines on the Y axis.
- The *No due date* column contains all objects without values in the respective *Due date* fields.
- The *Overdue* column lists all overdue items, i.e. items where the value of the *Due date* field is older than the starting date of the current week.
- Remaining columns to the right represent the timeline units (week numbers). The column indicated by a circled week number is the *Current week*.
- The folder icon in a certain column represent containers for questions and deliveries in which the respective *Due date* values correspond to that week number.
- Milestones are always listed in row #1 in the grid.

5.3.2 What can I do on the Weekly view?

- **Click a folder icon** in the grid's cells to open it and list all questions and deliveries inside
- **Mouse-over** an item to see a tool-tip containing essential custom field values
- **Click** a question or delivery to open its card in the content pane
- **Drag & drop** milestones, questions and deliveries to any other **column** in the grid, thus changing the value for the Due date field to the last working day of the target week
- **Drag & drop** a question between workflow **steps**
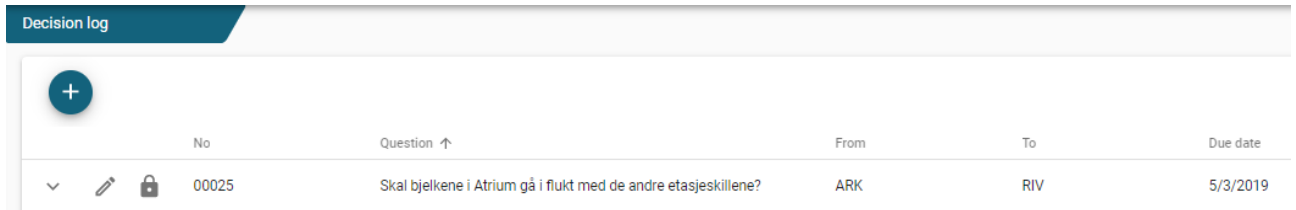
Options in the tool bar:

- Click the **+** icon to create a new question
- Click the **calendar icons** to select the viewing date interval
- Click the **PPC** button to select the PPC period and see the *Percent Planned Completed* figures
- Click the **COLLAPSE/EXPAND ROWS** button to hide/show all rows
- Click the **COLLAPSE/EXPAND CELLS** button to close/open cell objects
- Click the **magnifying glass icon** to activate high contrast and increased text size
- Click the **Filter** icon to select which disciplines to show and filtering options for all object types
- Click the **Settings** icon to select individual *Card titles* for all object types and the ability to show/hide questions and deliveries

Milestone, question and delivery Card actions:

- View and change field values in the General section
- Download, add and remove attachments
- Move a question to another workflow step in the *Move to* section
- Read and add comments

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5.4 Decision log

The *Decision Log* View looks exactly the same as the *List View*, but available actions are limited.

5.4.1 What can I do in the Decision Log?

- Click the + icon to add a new question
- Click a column heading to sort on that column
- Rearrange columns by drag-and-drop
- Change the column width as desired
- Click the down-arrow to get a pop-up showing all question card field values
- Click the pencil icon to open the question card
- Lock/unlock a question by clicking the padlock icon

In addition, this tool bar is available:

Tool bar options are:

- Enter a search text to match against all columns in the list
- Show/hide columns
- Filter content in any column by entering filtering text. The list is filtered while typing. Remove filtering by clicking the X icon

5.5 Question list view

The *Question list view* presents all questions consecutively:

5.5.1 What can I do in the Question list view?

- Click the + icon to add a new question
- Click a column heading to sort on that column
- Rearrange columns by drag-and-drop
- Change the column width as desired
- Click the down-arrow to get a pop-up showing all question card field values
- Click the pencil icon to open the question card
- Lock/unlock a question by clicking the padlock icon

In addition, this tool bar is available:

Tool bar options are:

- Enter a search text to match against all columns in the list
- Show/hide list columns
- Filter content in any column by entering filtering text. The list is filtered while typing. Remove filtering by clicking the X icon

5.6 The Milestone list view

The Milestone list shows all milestones for all milestone folders added to the visual board. Please note that folder definitions may differ:

5.6.1 What can I do in the Milestone list view?

- Click the + icon to add a new milestone
- Click a column heading to sort on that column
- Rearrange columns by drag-and-drop
- Change the column width as desired
- Click the down-arrow to get a pop-up showing all milestone card field values
- Click the pencil icon to open the milestone card
- Remove a milestone by clicking the paper bin icon

In addition, this tool bar is available:

Tool bar options are:

- Enter a search text to match against all columns in the list
- Show/hide list columns
- Filter content in any column by entering filtering text. The list is filtered while typing. Remove filtering by clicking the X icon

5.7 The delivery list view

The delivery list shows all deliveries on the visual board:

5.7.1 What can I do in the Delivery list view?

- Add a new delivery by clicking the + icon
- Click a column heading to sort on that column
- Rearrange columns by drag-and-drop
- Change the column width as desired
- Click the down-arrow to get a pop-up showing all fields on the delivery card
- Click the pencil icon to open the delivery card
- Remove a delivery by clicking the paper bin icon

In addition, this tool bar is available:

Tool bar options are:

- Enter a search text to match against all columns in the list
- Show/hide list columns
- Filter content in any column by entering filtering text. The list is filtered while typing. (Remove filtering by clicking the X icon)
- Subscribe/unsubscribe to any changes made to any deliveries

6 HOW DO I ADMINISTER VISUAL BOARDS?

Administering Visual Boards implies 2 aspects:

- Managing and configurating the underlying active folders
- Configurating the individual visual boards

6.1 The underlying active folders

Maintaining the underlying folders implies logging in as a Room Administrator using the Interaxo client and

- Configure the question folder (the active folder with workflow)
- Configure the delivery folder
- Configure the milestone folders.
  Note: A visual board may have many Milestone folders added to it. Also, milestone folders can be shared across multiple visual boards.

Please see relevant help articles and the quick guide *Get started with Interaxo* for detailed descriptions.

6.2 Individual boards

Once created, boards can be administered by performing the following steps:

- Log in as a Room Administrator to the Interaxo Administration client
- Navigate to the Room in question

   Workspaces & Rooms

- Click the *Visual Boards* main menu option
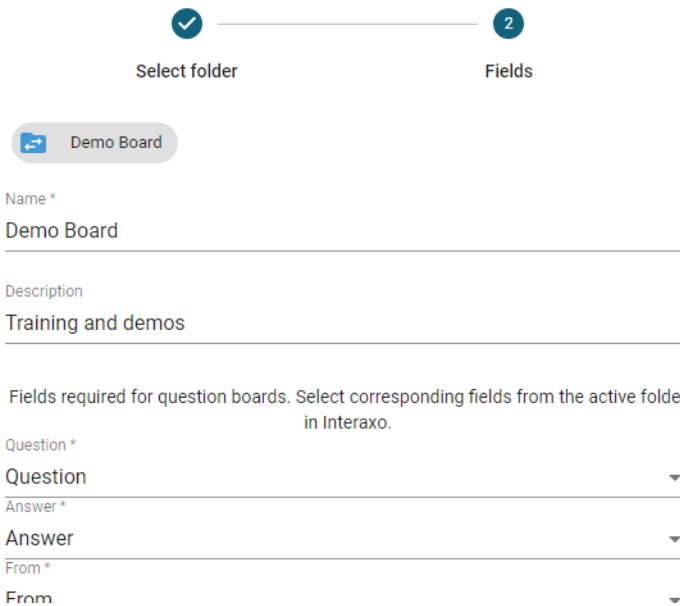
   Visual Boards

- Tick off the desired Board from the list in the content pane

☐	Name ↓	Description
☑	Tryvann ZL	Tryvann Zip Line

- Click

  ADMINISTER

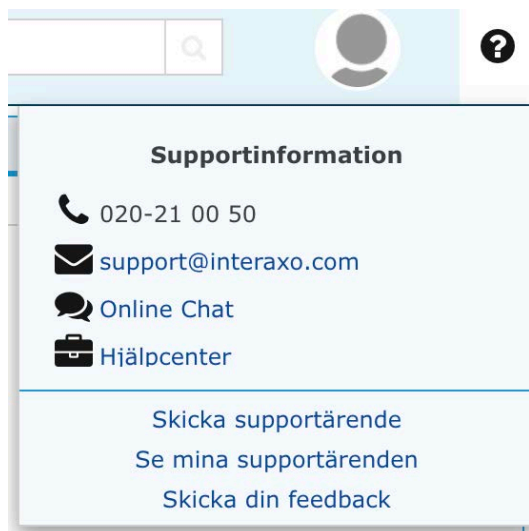- Map custom fields and workflow steps in the underlying Active Folder with Workflow to the visual board:

- To save your changes, click the SUBMIT button

7   HOW CAN I GET ADDITIONAL ASSISTANCE?

If more help is needed, you have several options. By clicking the question mark in the *Interaxo client*'s top pane, you can choose to:

Supportinformation

📞 020-21 00 50

✉ support@interaxo.com

💬 Online Chat

💼 Hjälpcenter

Skicka supportärende
Se mina supportärenden
Skicka din feedback

- Call Symetri Collaboration's Help Desk and talk to one of our support consultants

- Send an email to our support department

- Chat with a support consultant

- Click the *Help Center* and read more about Interaxo, the Administration Client and the Visual Boards client

- Create support issues

- Suggest improvements

In the *Administration Client* you can

- Initiate the *Help Center* by clicking the question mark in the top pane

- Report errors and change requests by clicking the light bulb

    Here you can enter your change requests. These will in turn be evaluated by our Product department. You can count on getting our feed back. Some times more information is needed, other customer might have similar requests etc. We always aim at following up your requests by informing you on how the request will be handled further down the road.