



PMWeb Version 8.0

RELEASE NOTES

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Overview

PMWeb version 8.0 features three brand new features—Adaptive Forms, Power BI Reporting, and Multi Factor Authentication—as well as a bunch of enhancements to existing features and bug fixes.

Adaptive Forms

PMWeb has long had a page designer (Classic Form Builder) but version 8.0 introduces an all-new companion tool, Adaptive Forms.

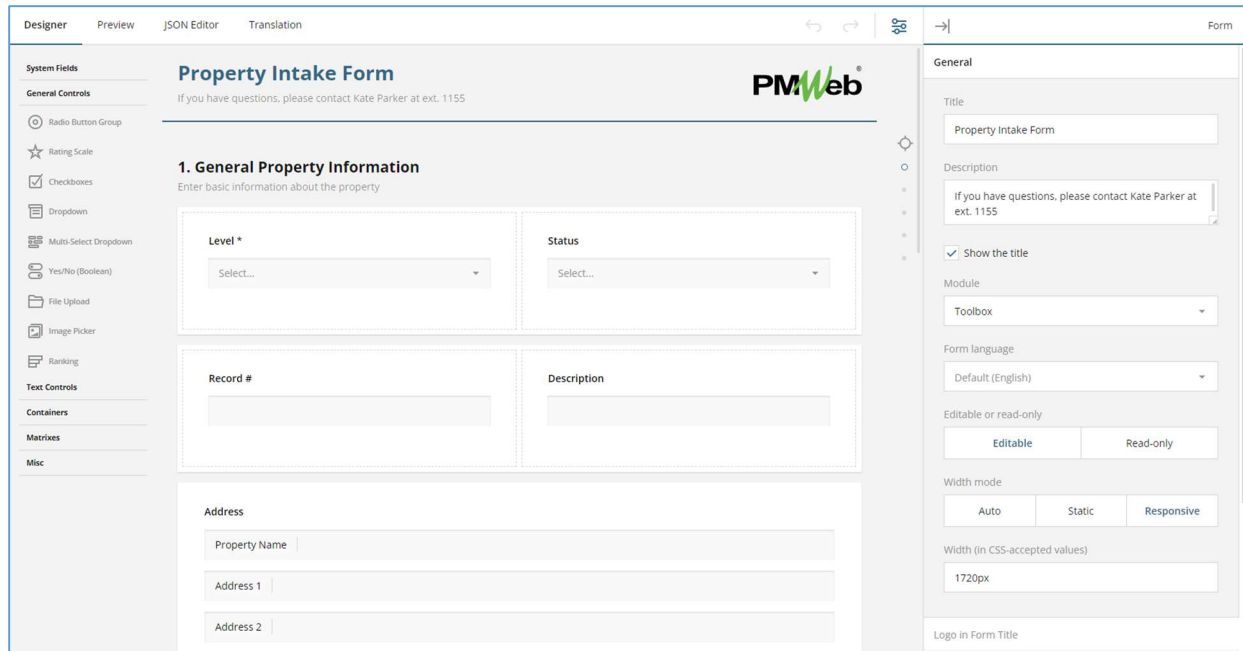


Figure 1 - The New PMWeb Adaptive Form Designer

Adaptive Forms highlights include:

- A brand-new designer interface
- Drag and drop to add controls and move them
- Dozens of controls with detailed configuration options for each
- Use native PMWeb data and create data options on the fly
- Adaptive Forms automatically reformat themselves to fit the screen
- Design one form that automatically works on desktops, laptops, tablets, and phones
- Preview adaptive behavior on various devices with a click, from inside the designer
- Create forms at System, Project Program, Project, Initiative, Location Program, or Location level
- Designer is fast, easy, and intuitive
- Build your own tables in seconds
- Add custom calculations and conditional logic
- Easily create validation rules to guide users completing your forms
- Copy forms quickly and easy
- Use PMWeb Visual Workflow and sign your forms digitally



Figure 2 – Immediately Preview your Adaptive Form on Various Devices

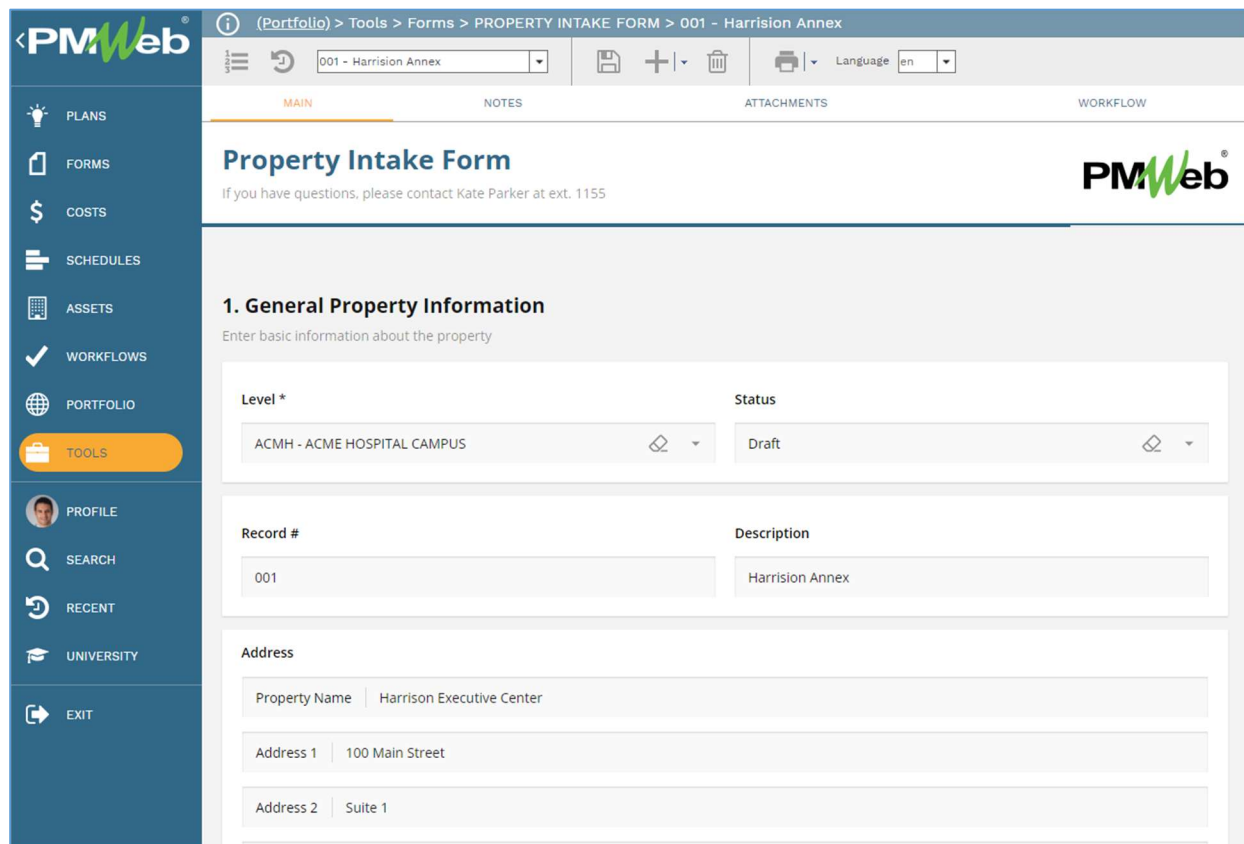


Figure 3 - Adaptive Forms work just like PMWeb System Forms

Power BI Reporting

With version 8.0, PMWeb is now integrated with Microsoft's advanced reporting platform, Power BI.

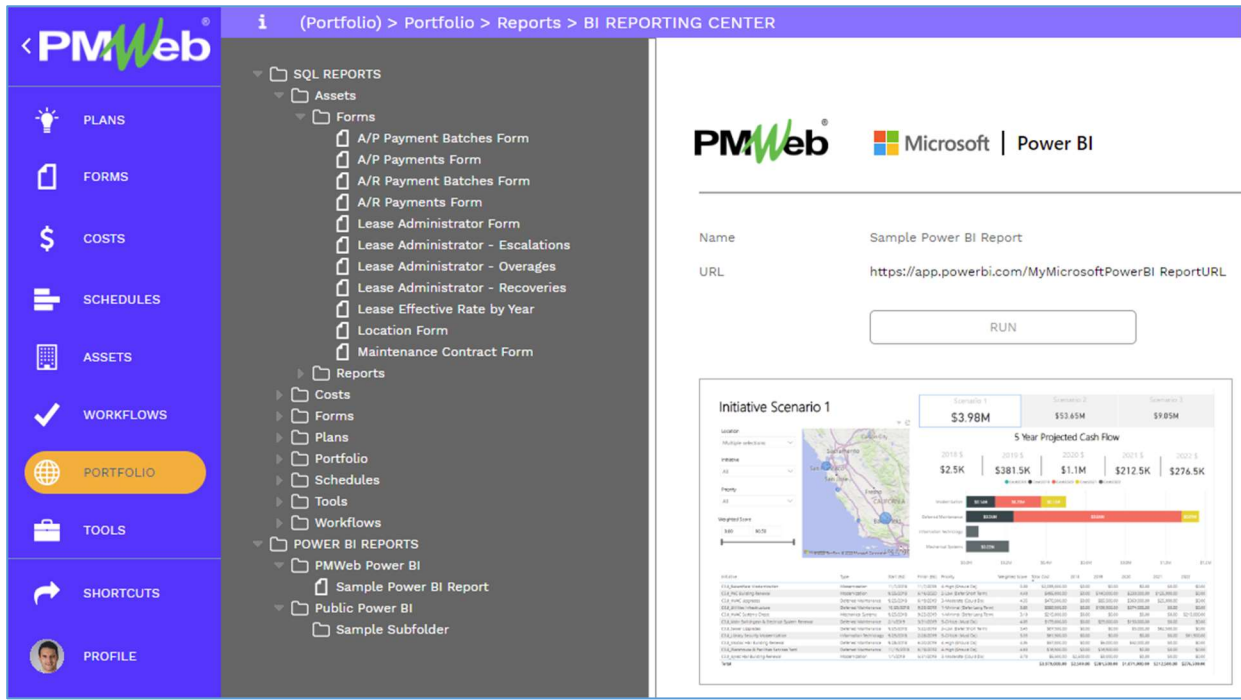


Figure 4 - PMWeb / Microsoft Power BI Reporting

Users can easily add reports by right-clicking on one of the new Power BI Report folders. In the dialog, type or paste the Power BI Report URL, upload an optional preview image, and you are done!

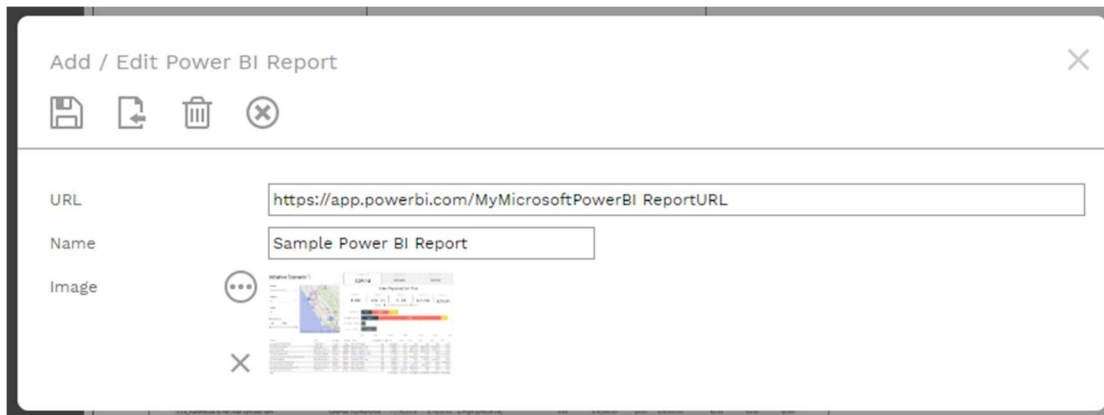


Figure 5 - The Add / Edit Power BI Report Dialog

Reports run from the *PMWeb Power BI* folder will enforce all PMWeb security restrictions that are designed in them. If you run the same report from the *Public Power BI* folder, PMWeb security restrictions will not be enforced.

Multi Factor Authentication

To enhance security, system administrators can now require users to enter both a password and a randomly generated access key when logging in. To enable multi factor authentication (MFA) for a user, in Security/Define Users click the Multi Factor checkbox for the user to select it.

GROUP NAME*	PASSWORD	MULTI FACTOR	RESET MFA
er Group 1	●●●●●●	<input checked="" type="checkbox"/>	RESET MFA

Figure 6 - The New Multi Factor and Reset MFA Columns

The first time the user logs in after MFA has been activated for their account, they will see this dialog:

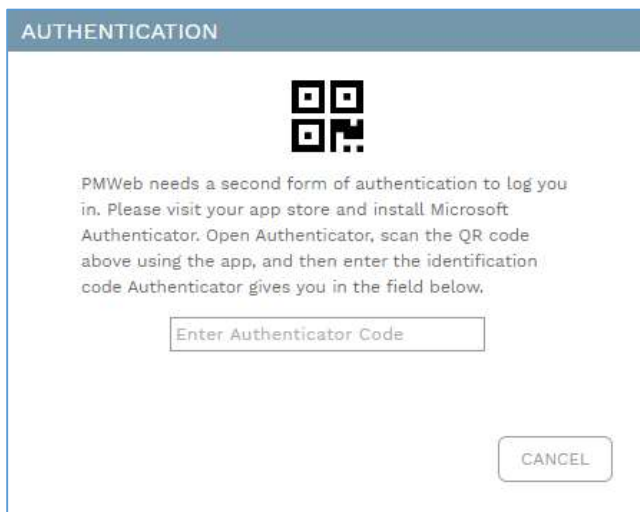
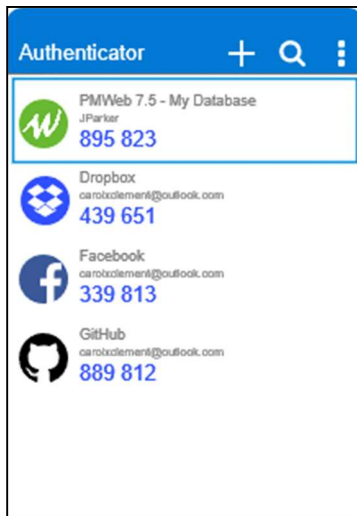


Figure 7 - The Authentication Dialog

After they scan the QR code, the user will see something like this for PMWeb in the Microsoft Authenticator app:



The user will enter the code in the Authentication dialog. As soon as the sixth correct digit is entered, the dialog will close and PMWeb will open.

Enhanced Features

In addition to the new Adaptive Forms and Power BI Reports, PMWeb version 8.0 also includes these enhancements:

- Workflow calendar – You can now define calendars of work and off days in the Workflow module. Calendars are then considered when calculating due dates in each Visual Workflow step.
- Enhanced schedule linking – When linking in Schedules you can now select XML ZIP files. Plus, we made several improvements to the function and layout of the Link Schedule dialog.
- Generating improvements – Now all project- and location-based record types, as well as Classic Custom Forms and the new Adaptive Forms, are available in the From and To fields of the Generating setup page.
- We added Field Level security to:
 - All Details table fields in all Plans, Costs, and Forms record types
 - All Header and Details fields in Risk Analysis, Stage Gates, and Timesheets
- You can now use the Notifications tab in Project records
- There is now an option in the Specifications setup page to hide the UOM column for a specification tab
- Header Specifications fields are now available to be shown in layouts in Manager Pages
- Attachments field - A new field, Attachments, is available in Manager Page layouts. This field shows the total count of attachments for each record. Please note that individual users might not be able to view all of the attachments shown in the count, due to security restrictions.
- Audit Trail improvements:
 - A new field—“Program/Location Prog.”—has been added to the audit trail
 - A new multi-select filter search parameter—“Program(s)—has been added to the Audit Trail page
 - All lines in Portfolio/Settings/General Settings have been made available to the audit trail

Conclusion

Version 8.0 brings major new and improved features to the award-winning PMWeb platform. Easy and sophisticated custom forms, Power BI, more advanced security, and dozens of improvements and fixes make this the best version yet. Contact PMWeb Support to schedule your upgrade, today.



PMWeb Adaptive Forms

Version 8.0 and Higher

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Designing Adaptive Forms

Introduction

PMWeb's Adaptive Forms let you quickly and easily design, build, and deploy virtually any kind of form within our award-winning project management platform. Simply drag and drop sophisticated controls onto the design canvas, configure them with a few clicks, and immediately see what your form will look like on various devices. Adaptive forms can then be shared with any PMWeb users you wish. You can build improved versions of the forms you already use or invent entirely new ones.

New Property Form

To be submitted with property financial plans

General Information

Basics

Location *	Record # *	Description	Visual Workflow Status
ACMH - ACME HOSPITAL CAMPUS	C10548-9876	Holmes Loding House	Draft
Zoning District	PMWeb Location Type	Inspector	Included in BOMA Budget?
Mixed Use	Medical	Carey Woodson	<input type="radio"/> No <input checked="" type="radio"/> Yes

Amenities	Attach Photos and Planning Files	Condition																																
<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">Name</th> <th style="width: 20%;">Quality</th> <th style="width: 20%;">Usable?</th> <th style="width: 30%;"></th> </tr> </thead> <tbody> <tr> <td>Fitness center</td> <td>★★★★☆</td> <td><input type="radio"/> No <input checked="" type="radio"/> Yes</td> <td></td> </tr> <tr> <td>Swimming pool</td> <td>★★★☆☆</td> <td><input type="radio"/> No <input checked="" type="radio"/> Yes</td> <td></td> </tr> <tr> <td colspan="4"><small>Add Row</small></td> </tr> </tbody> </table>	Name	Quality	Usable?		Fitness center	★★★★☆	<input type="radio"/> No <input checked="" type="radio"/> Yes		Swimming pool	★★★☆☆	<input type="radio"/> No <input checked="" type="radio"/> Yes		<small>Add Row</small>					<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;"></th> <th style="width: 20%;">Excellent</th> <th style="width: 20%;">Good</th> <th style="width: 30%;">Poor</th> </tr> </thead> <tbody> <tr> <td>Exterior</td> <td><input checked="" type="radio"/></td> <td><input type="radio"/></td> <td><input type="radio"/></td> </tr> <tr> <td>Interior</td> <td><input type="radio"/></td> <td><input checked="" type="radio"/></td> <td><input type="radio"/></td> </tr> <tr> <td>Grounds</td> <td><input type="radio"/></td> <td><input checked="" type="radio"/></td> <td><input type="radio"/></td> </tr> </tbody> </table>		Excellent	Good	Poor	Exterior	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Interior	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Grounds	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
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Grounds	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>																															

Figure 1 - PMWeb Adaptive Form

This document outlines in general terms the process of designing Adaptive Forms and using them within the PMWeb application. For more information, please consult PMWeb online help and your PMWeb implementation consultant or trainer.

The Designer Tab

The general workflow for creating an Adaptive Form is to:

- Click the Form settings button and use the Settings pane to set form basics
- Complete the Title section by typing over the default title and subtitle and selecting a logo
- Drag a control from the Controls tree on the left side of the Design tab
- Drop it on the Design canvas in the center of the page
- With the control still selected, configure it using the Settings pane on the right side of the page

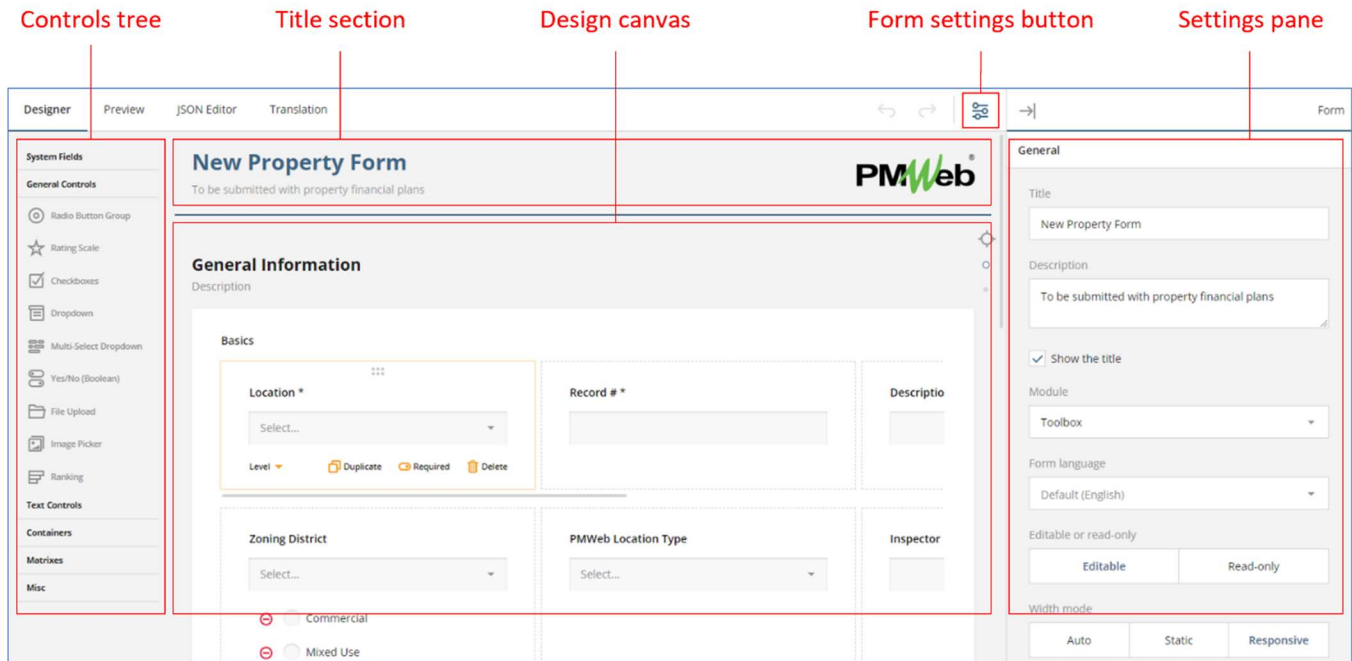


Figure 2 - The Adaptive Forms Designer Tab

Form Level Settings

Key settings at form level include:

- Module – Select a PMWeb module from the list. The Adaptive Form will appear under that module in the main menu.
- Form language – Select the default language for the form. You can use the Translation tab to translate the form into other languages.
- Width settings – Determine the adaptive behavior of the form and its default width
- Navigation – Set behavior for navigating page to page
- Field – Set default layouts for controls added to the form
- Pages – Add and edit pages
- Validation – Determine when your validation rules are run
- Logic – Create calculated values and custom triggers

Controls

The Controls tree is organized by category.

System Fields

- Level – Adaptive forms can be assigned to System, Project Program, Project, Initiative, Location Program, or Location level. The choice you make here determines the most basic security for the form as well as what types of PMWeb data you can use on it.
- System List – Drop this control on the form and then use the System section in the Settings pane to link to an existing PMWeb list
- Status, Record Number, and Description are standard fields that appear on most other PMWeb record types

General Controls

- Dropdown – Use this control to define a list of values within the form for users to select from. If you want values from predefined PMWeb lists, use the System List control in the System Fields section.
- Multi-Select Dropdown – The same as above but with the option for users to select multiple values
- File upload – Prompt users to upload one or more files and use settings to determine which file types will be accepted
- Checkboxes, Yes/No switches, radio buttons, and many more general controls are available

Text Controls

- Add single-line, memo, and grouped text fields to the form

Containers

- These are panels that let you group controls on the page

Matrixes

- Single-Select Matrix – Great for ratings tables, with multiple lines and multiple columns to select from
- Multi-Select Matrix – Create tables with a fixed number of lines and multiple columns of different data types
- Dynamic Matrix – The same as the Multi-Select Matrix, but allowing the user to add lines

Misc

- Expression – Display custom calculations
- Image – Display a preselected image
- Signature – Provide a digital block for the user to write a signature

The Settings Pane

To use the settings pane, click on a control in the design canvas to select it, and then use the options in the pane to configure the control. The settings that appear in the pane vary, depending on the control that is selected in the canvas. You can also click the Form Settings button to view and edit form-level settings in the pane.

The Preview Tab

Use this tab to preview what your form will look like on various devices. You can also practice entering data in the controls to see how they will behave.

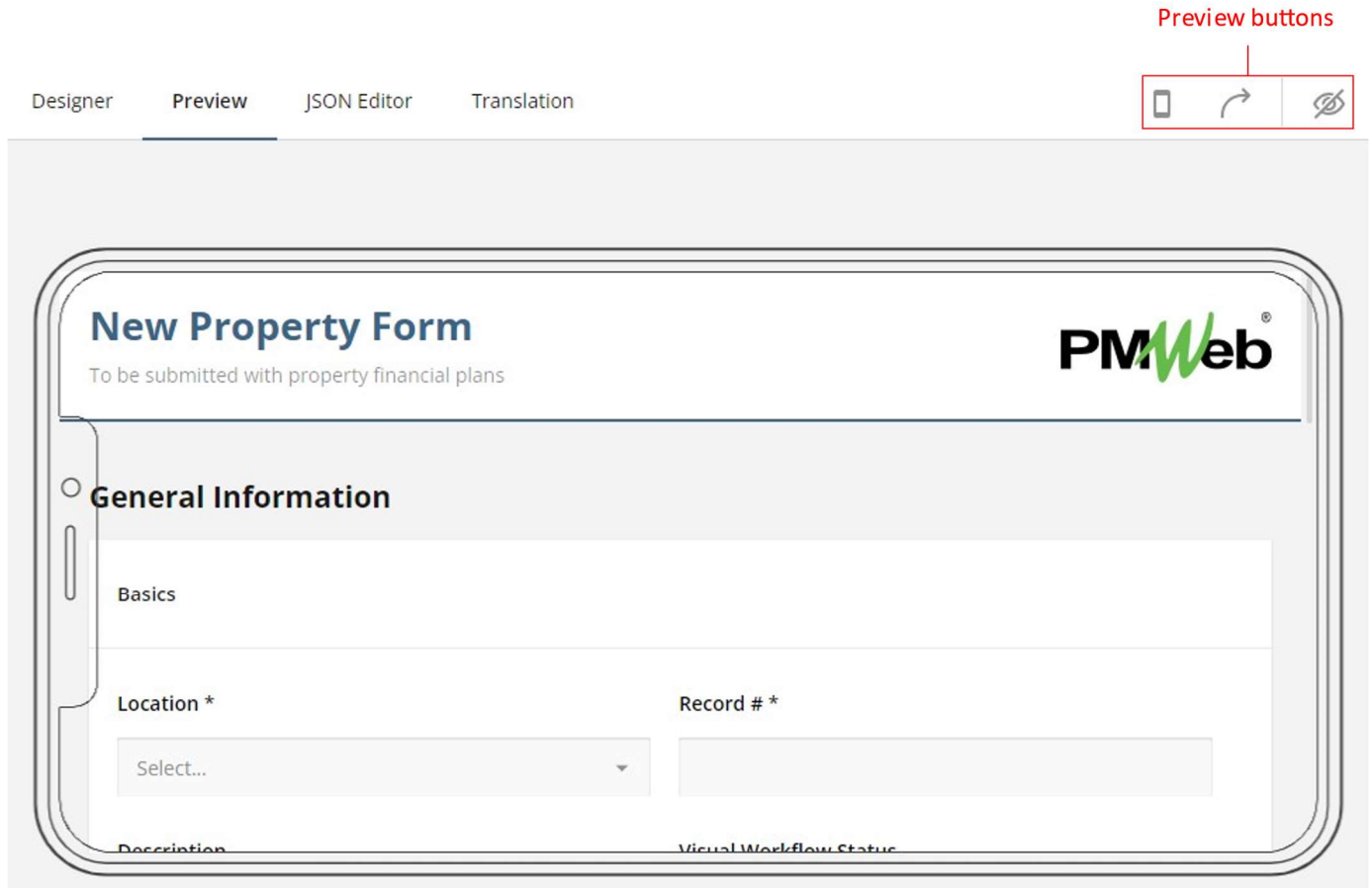


Figure 3 - Immediately Preview your Adaptive Form on Various Devices

The tab includes these Preview buttons:

- Device Type – Select from a list of devices
- Orientation – Switch between portrait and landscape orientation on the same device
- Invisible Elements – Show or hide invisible controls

The JSON Editor Tab

All of the data in a PMWeb Adaptive Form is saved in a single data file in the JSON format. That data appears in the JSON tab. You can copy the data and then paste it into a new form to make an exact copy.

The Translation Tab

	Default (English)	Français	简体中文
Title	New Property Form	Translation...	Translation...
Description	To be submitted with property financial plans	Translation...	Translation...
Logo (URL or base64-encoded string)	data:image/png;base64,iVBORwOKGgoAAAANSUHEUgAAAIgAAADICAIAAAHM+jh3AAAAbnRSTIMA/wD/AP83WBt9AAAAACXBIWXMAAC4JAAAUwF4pT92AAAACXRFWHRDb21tZW50AAAJKCo0GAAAgAEIEQVR4nOxdCXRUrdZuFkkQQZwwaODoICKcwQ84DIKhADBYQbxZzXoSl	Translation...	Translation...

Figure 4 - The Translation Tab

Click the Add Language button and select a language from the list to add a translation. A new column for that language automatically appears in the Language columns section, alongside the default. For each element in the language column, type a translation. You can also use the Import/Export buttons to translate via .csv files.

The Assign Permissions Tab

Use this tab to assign security rights to PMWeb users, by group or individually.

Name	Quality	Usable?
Fitness center	★★★★☆	No Yes
Swimming pool	★★★☆☆	No Yes
Add Row		

Figure 5 - Adaptive Forms work just like PMWeb System Forms



PMWeb Multi Factor Authentication

Version 8.0 and Higher

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Introduction

If Multi Factor Authentication (MFA) is enabled for a user, they are required to provide both a password and a randomly generated access code when logging in to PMWeb. MFA does not require separate licensing. If you have PMWeb version 8.0 or higher you can enable it by user.

Administering Multi Factor Authentication

Enabling MFA by User

1. Navigate to Security/Define Users
2. In the Details table, click the Multi Factor checkbox for each desired user

GROUP NAME*	PASSWORD	MULTI FACTOR	RESET MFA
er Group 1	■■■■■■	<input checked="" type="checkbox"/>	RESET MFA

Figure 1- The Multi Factor and Reset MFA Columns

The next time the user tries to log in, and every time thereafter, they will be required to follow the steps described below.

Notes

- MFA can be turned off at any time by unchecking the Multi Factor checkbox
- MFA can be used with LDAP users
- MFA cannot be used with SAML users

Resetting MFA by User

If you click the reset MFA button, the current connection between the user's Microsoft Authenticator account and the PMWeb database will be deleted. The next time that the user tries to log in to PMWeb they will be prompted to establish a new connection by scanning the QR code again.

Logging in with Multi Factor Authentication

Logging in the First Time

The first time you log in to PMWeb after MFA is enabled for your user account, you are required to establish a connection between PMWeb and Microsoft Authenticator. This section describes that process.

On the PMWeb Login page, select a database (if applicable), enter, or select your user name, enter your password, and then click the Login button, as usual. If MFA has been enabled for your account, and if this is your first login since then, you see this dialog:

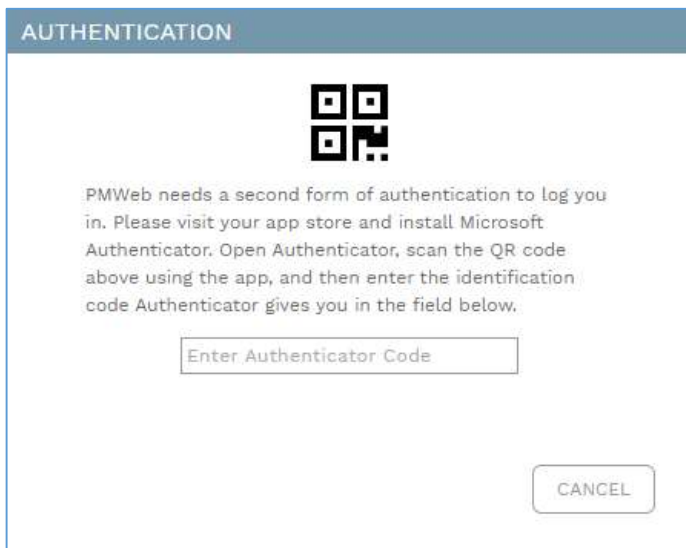


Figure 2 - The Authentication Dialog - First Login Version

Follow these steps:

- On a mobile device, download the Microsoft Authenticator app. The app is available for both iOS and Android operating systems.
- Open Authenticator
- Click the plus button to add a new account
- You are prompted to select what kind of account you are adding. Select “Personal account”.
- You are prompted to sign in with Microsoft or scan a QR code. “Select Scan a QR code”.
- Scan the QR code in the Authentication Login dialog
- You will then see a PMWeb account added to the Authenticator screen. The account will look something like this:

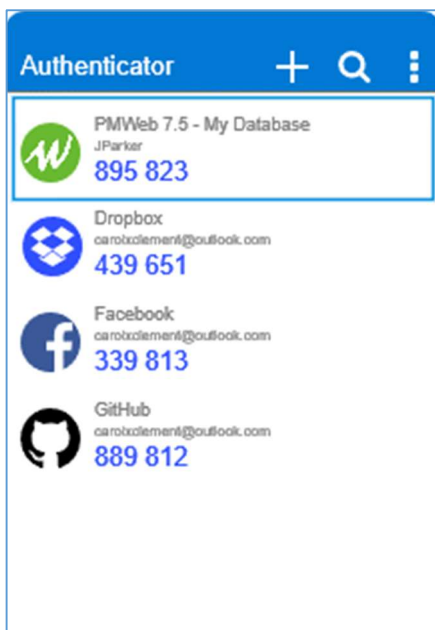


Figure 3 - Microsoft Authenticator with a PMWeb Account

- Note the 6 digit code for the account—“895823” in the screenshot
- In the PMWeb Login page, type the 6 digit code into the Authentication dialog. When the sixth correct digit is entered, the Authentication dialog will automatically close and PMWeb will open.

Notes

- A new code is automatically generated by Authenticator every 30 seconds. Only the code currently showing in Authenticator will open PMWeb.
- Authenticator accounts are specific to one PMWeb database. If you need to access multiple PMWeb databases, you will need to create an Authenticator account for each and be sure to enter the code for the correct database when logging in.
- If an incorrect code is entered, you will see an error message:



Figure 4 - Authentication Dialog Error Message

Subsequent Logins

In subsequent logins, if PMWeb sees that you have an Authenticator account for the database and user name combination, you see a different version of the Authentication dialog:

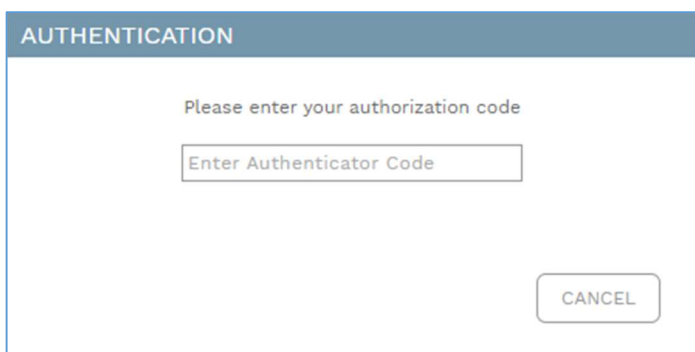


Figure 5 - The Authentication Dialog - Regular Version

Follow these steps:

- Open the Authenticator app
- Note the 6 digit code for the account
- In the PMWeb Login page, type the 6 digit code into the Authentication dialog. When the sixth correct digit is entered, the Authentication dialog will automatically close and PMWeb will open.