Activities

Release 15.3.1.4

CONTACT Software

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Contents

Introduction

CONTACT Activities shows current discussions and system messages in a continuous activity stream, which are either relevant to your working context or are intended for all users. Subscribed channels are used to control what information is displayed. *CONTACT Activities* also allows objects to be shared between users.

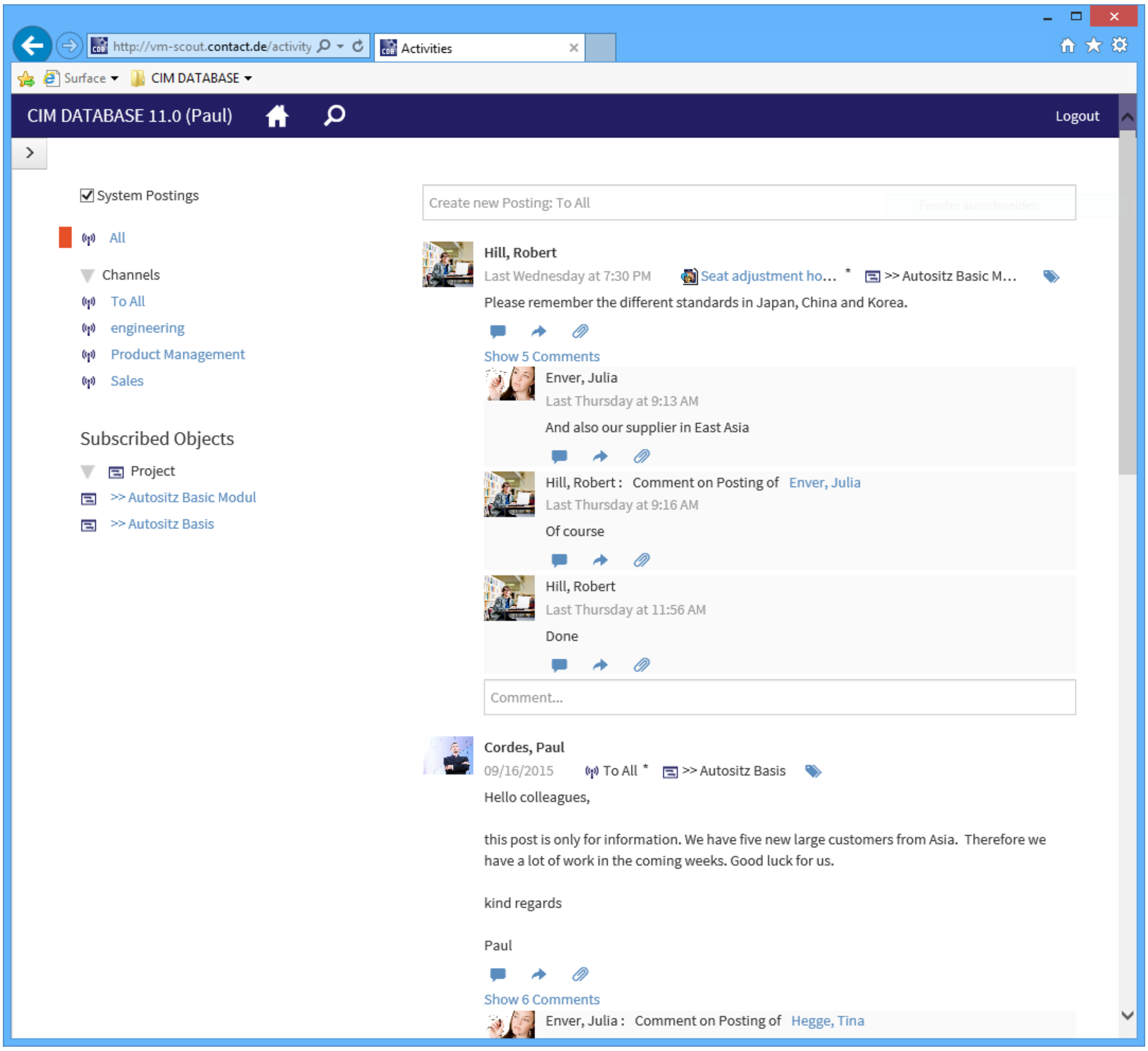

Fig. 1.1: The *Activities* application in the web browser

1.1 Information to all

Announcements or discussions that are intended for all system users are displayed in the predefined "All Postings" channel. This automatically exists for all users. The predefined channel cannot be deleted.

1.2 Purposeful communication

Specifically targeted communication can be done

- In predefined channels (for ex. "Development", "Sales", "Research")
- Directly in an object's activities
- By *:sharing* (page 8) objects

This way, you can carry out tasks such as creating reviews for documents, which are then directly linked to the object. Or, as a project manager, you can organize all communication for the respective project.

1.3 Automatically generated messsages

Important events of objects that you subscribed to are logged by the system and displayed in the activity stream, e.g. if a document has been released or a milestone has been reached. The events that appear in the *Activities* can be configured depending on your requirements.

1.4 Subscribed channels

Information about channels and objects then appear in your stream of messages if you have subscribed to the channel or the object. Subscribed channels can be created automatically or manually.

Automatically subscribed channels are defined using your roles and affiliations, e.g. if you belong to a project as a project member, are the editor for a task, or belong to a department that has its own channel, such as marketing or construction.

Manually subscribed channels are possible for each object and each channel if you have the necessary rights.

1.5 Daily activities as E-Mail

Users who don't work with the *Activities* daily may navigate to *Settings* → *Personal Settings* → *Notifications* and enable the option `Latest Activities (Daily)`. If activated, the user will get an e-mail once a day containing all activities of the last day. The text is shown completely but the attachments are represented by hyperlinks only.

System access

2.1 Windows Client

Fig. 2.1: Start *Activities* from the toolbar of the Windows client.

Click the *Activities* symbol in the toolbar. The *Activities* application opens in a new tab of the view area.

2.2 Web Browser

Activities are displayed as start page in the web interface after login. If you have opened a detail view or the search page, jump to the activities using the *Home* button on the navigation bar.

2.3 Windows Client Info Dialog

The associated postings and messages are displayed on the *Activities* tab in the business object's info dialog. In this way, you can also see activities to which you have not explicitly *subscribed* (page 7).

2.4 Detail view in the web user interface

The detail view of the business object in the web interface contains an *Activities* area that can be minimized.

CHAPTER 3

Operations

You can create new postings in the *Activities* application, enter your comments to existing threads or learn about the current revision of the business objects to which you are subscribed.

The *Subscribe to topic or channel* (page 7) operation allows you to gain an overview of topics that you do not work on directly, but whose development could be of importance to your work.

3.1 Display functions

3.1.1 Reloading older information

Use the mouse wheel or the touch gestures available on your system to scroll down. Older information is reloaded and displayed.

3.1.2 Displaying new information

If new information exists, you will be notified of this via a button below the *New Posting* input field. Clicking the button updates the activity stream and displays the new information.

3.1.3 Filtering the displayed information

Different filtering options are available in the left *filter area* (page 1):

- Displaying or hiding system messages
- Filtering by channels
- Filtering by objects to which your are subscribed

3.2 Detailed information on business objects

You can call up detailed information on business objects. Depending on context, this either occurs via the drop-down menu on the right side of the posting title or the title of the business object is linked. The info dialog is opened in the PC client; the detail view is opened in the web interface.

3.3 Types of information in the activity stream

The activity stream contains different types of information:

- Postings for business objects

- System messages for business objects
- Postings within channels
- Postings that are intended for all users

System messages are automatically created and provide information on certain events, e.g. the status change in a project or the change of ownership for a task. The system messages that appear in the *Activities* are defined in the respective application.

Postings to an object, e.g. a project or document, appear in the activities, if you have subscribed to the business object. You can select this in the filter area under *Subscribed* and then only the system messages and object postings will be displayed. For projects, the postings from associated objects such as documents, tasks and parts are also aggregated in the activity stream.

3.3.1 Creating postings and comments

You can activate a text field by directly clicking it or by selecting the icon with the speech bubble symbol.

When activating the text field of a posting or comment, two rows will be displayed below the text field (see image *Create a posting or a comment* (page 5)).

Within the first row the text *Drop Image/Video or click here* is shown.

- *Publish*
- *Cancel*
- *Attach objects*

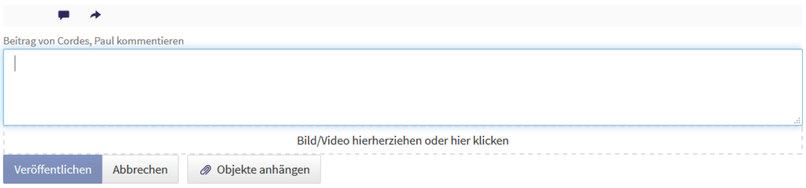

Fig. 3.1: Create a posting or a comment

Creating a new posting to all

1. Select the option *All Postings* in the filter area
2. Activate the input field *Create new Posting: To All ...* and enter your text here.
3. Select the *Publish* button. The view is updated; the posting appears in the first position and is visible to all users.

Creating a new posting to a subscribed object or channel

1. Select the object or the channel for which you would like to create a discussion in the filter area
2. Activate the input field *Create new Posting: [Object Name|Channel Name]* and enter your text here.
3. Select the *Publish* button. The view is updated; the posting appears in the first position and is visible to all users.

Entering a comment

1. Activate the *Comment* field and enter your text into it.
2. Select the *Publish* button. The discussion is updated with your comment and appears at the first position.

Note: For long discussions, you can enter a comment in context. The comment you are referring to is marked with a link to the person who created the comment. The text is displayed if you hover your mouse pointer over the link.

3.3.2 Assign to further business objects

You can assign postings or discussions to further business objects, e.g. if an idea results in a project and previous postings should appear in the *Activities* of the project.

1. Click on the icon with the label symbol in the row below the author name. The search dialog for selecting a business object appears.
2. Enter the search term for the business object in the search field. A list appears with the business objects that match the search term.
3. Select the business object you would like to assign and confirm your choice.
4. The business objects are displayed as additional business objects.

Note: The business object for which the posting was originally created is marked with an asterisk.

3.3.3 Adding images

Click the row *Drop Image/Video or click here*. A file browser opens. Now you can select images from your local hard disk or from a connected network drive and add them to your posting or comment.

Before publishing an added image you are able to delete it if necessary.

3.3.4 Adding business objects

You can attach further business objects (e.g. documents, projects, parts, etc.) to your posting.

1. Click on the button *Attach Objects* below the text field. The search dialog for selecting a business object appears.
2. Enter the search term for the business object in the search field. A list appears with the business objects that match the search term.
3. Select one or many business objects you would like to attach and confirm your selection.
4. The business object is displayed as an attachment of the posting.

Note: The usage of a business object as an attachment of a posting **does not appear** in the activities of the business object!

3.4 Topics and channels

A posting can be created in the context of a business object (project, part, document, etc.). This business object is created as the topic in the system, which can be used to group the postings created for the topic. A business object can only become a topic if an activity stream exists for this business object and postings can be created there. You can assign a posting to multiple topics for this. One example would be to create a posting for a document that is linked to a project. The posting is then assigned in the document as well as in the project.

Channels are particular types of topics. A channel is a business object that is only used to provide the context for a posting. You can subscribe to a channel in the personal *Favorites* area within the *Predefined favorites* in the PC client.

3.5 Subscribed channels

3.5.1 My subscribed channels

You can view your current subscribed channels in your personal data record in the PC client. To do so, switch to the *Subscribed channels* tab.

Note: Frequently, a channel is subscribed automatically if, for example, you have been assigned to a new project as a team member.

3.5.2 Subscribing to business objects (only in the Windows Client)

1. Select the *Activities* → *Subscribe* function in the pop-up menu of the business object. You now subscribe to this business object.
2. Open the activities. The business object is displayed in the filter area below *Subscribed*.

3.5.3 Subscribing to channels (only in the PC Client)

1. Open the favorites window and start searching by double-clicking on the *Channels* entry in the predefined favorites.
2. Enter a search term and perform the search. If you do not enter a search term, the entire channel hit list will be displayed.
3. Open the pop-up menu of the channel you would like to subscribe to and select the *Activities* → *Subscribe* function. You are now subscribed to this channel.
4. Open the activities. The channel is displayed in the filter area below *Channels*.

3.5.4 Deleting subscribed channels (only in the PC Client)

1. Select the *Activities* → *Delete Subscribed Channels* function in the pop-up menu of the business object or channel. The subscribed channel is deleted.
2. Open the activities. The business object or the channel has been removed in the filter area.

Note: The display of postings that are directed to all cannot be hidden.

CHAPTER 4

Share objects

By `sharing` objects, you can explicitely direct your communication via *Activities* by both selecting recipients and attachments for your message. Communication between system users thus can be done completely without external tools (like E-Mail).

The operation `Share` can be activated for almost any object. If it is missing in an object's context menu, please contact your system administrator.

4.1 Windows Client

Select one or more objects to be shared. Click the item *Share* in the selection's context menu. The application *Share* will be opened in a new tab.

4.2 Web Browser

Open an object's details page. You will find the button *Share* in its header area.

4.3 Operation *Share*

The dialog consists of three areas:

- Attachments (objects to be shared)
- Recipients (Persons, Roles, Recipient Lists being able to see the shared objects via their *Activities*
- Message

4.3.1 Attachments

The objects selected when starting the operation are already attached. Additional attachments can be added by using the search box, where you can perform system-wide searches using Enterprise Search.

Some attachments have predefined recipients for your convenience, for ex. the attachment's creator, responsible person, or project team.

4.3.2 Recipients

By typing into the `Recipients` input field, you will start searching for persons, common roles and recipient lists. You can then select one of the suggestions or refine your search.

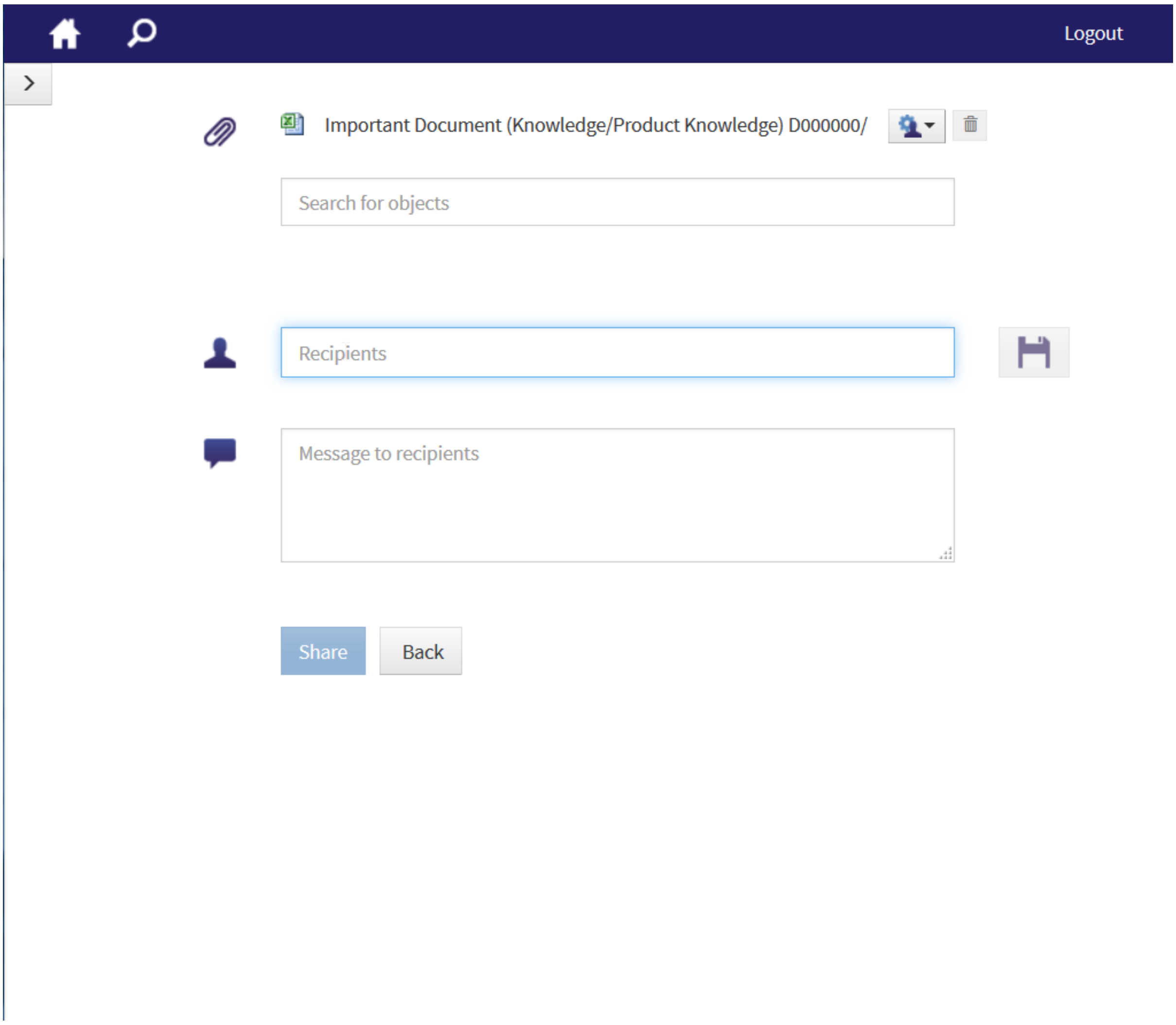

Fig. 4.1: The dialog *Share*

After selecting at least one recipient, the button `Save current recipients as new list` will become active. It allows you to save your current selection of recipients as a personal recipient list for reuse.

Already selected roles and recipient lists can be resolved by clicking the icon to the left of their names. By resolving a role/list, you replace it with its members in your current recipient selection. If a role/list contains more than 10 persons, you will be required to confirm its resolution.

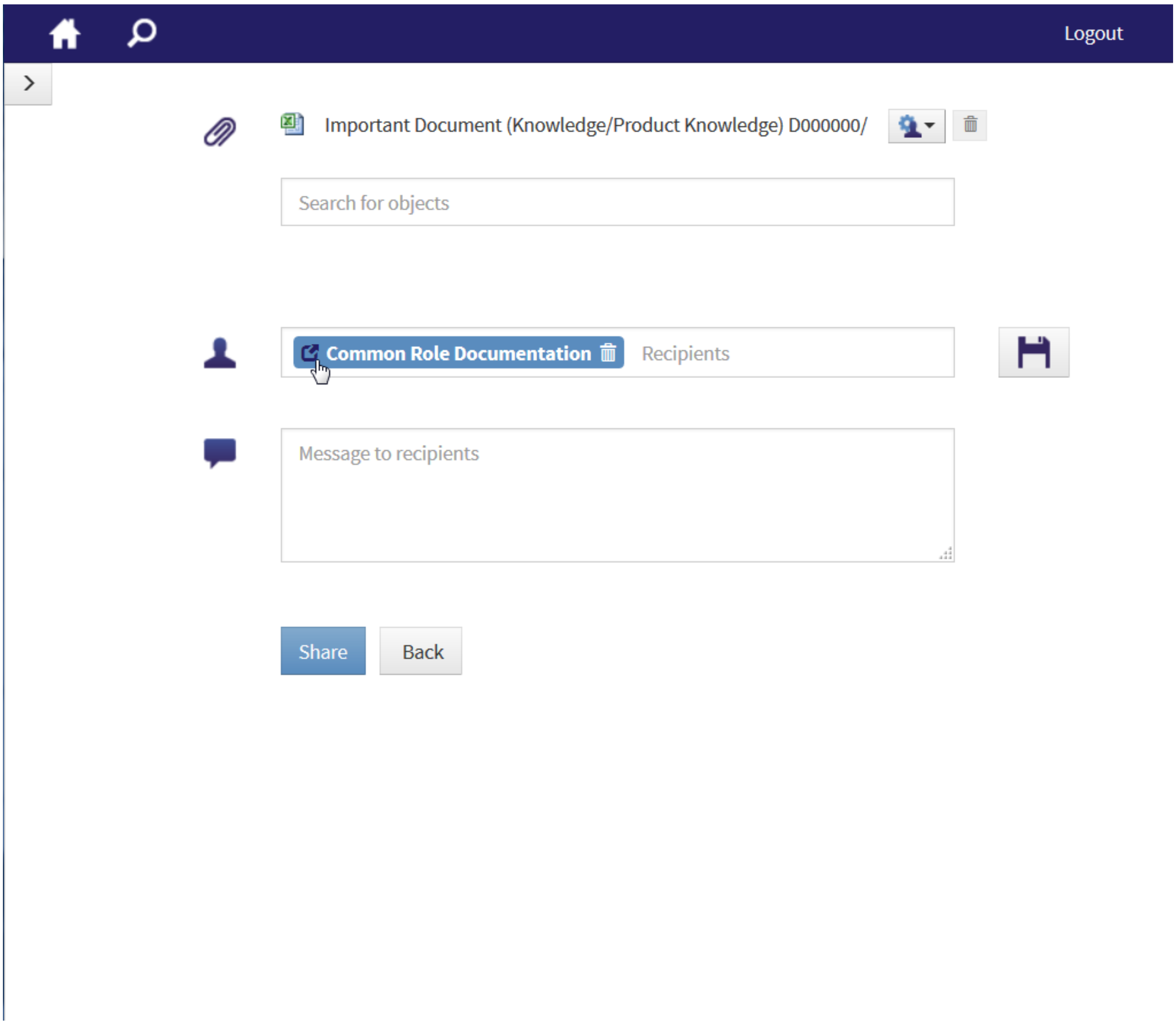

Fig. 4.2: Resolve roles

4.3.3 Message

You can specify your intentions with a message. Usually, this will be a notification regarding important changes or news, or questions and discussions.

Entering a message is optional.

4.3.4 Completing the operation

To complete the operation with the button `Share`, you have to select at least one attachment and one recipient.

After completing the operation, the tab will be closed automatically (Windows client), or a summary page will be displayed (Web Browser). Recipients can now see the shared objects in their *Activities*.

Note: Roles and recipient lists will be resolved automatically. If you share an object with the role “Sales”, and someone new is joining Sales the next day, they will not subsequently receive the shared objects.

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