

Redmine - Feature #8050

Mightful workflow field enhancement: visible, read only and mandatory

2011-04-03 02:15 - Terence Mill

Status:	Closed	Start date:	2011-04-03
Priority:	Normal	Due date:	
Assignee:		% Done:	0%
Category:	Issues workflow	Estimated time:	0.00 hour
Target version:			
Resolution:			
Description <p>The problem with a bigger workflow is that some of the fields should be only visible at a later status (e.g. status=Test, which needs additional fields like "tester"), or the field should be set by a certain role only (field is readonly for other roles, e.g. progress is only used in development stage by developers) or a status can only be changed if a certain field is set (field is mandatory for status change and and role, e.g time estimation must be set before status can change to planning)</p> <p>I would propose a easy but mighty enhancement which will solve them all:</p> <p>There should be a matrix to set rights, visibility and duty dependent on role and status in every cell in the matrix there is a row for every field of tracker and every row has field name followed by 3 checkboxes:</p> <ul style="list-style-type: none">• visible (not visible)• read only (writable))• mandatory (optional writable) <p>Rules:</p> <ol style="list-style-type: none">1. if field is visible (visible=false then 2 and 3 are greyed)2. if field id read only (1 is true, read only=true then 3 is greyed)3. if field is mandatory (1 is true, 2 is false) <p>Since some users won't need this kind of advanced workflow there could be a default for this 3 properties for all fields. Today the default is visible=true, read only=false and mandatory=false (Except Subject ;))</p>			
Related issues:			
Related to Redmine - Feature #703: Configurable required fields per tracker/s...		Closed	2008-02-21
Related to Redmine - Patch #7444: Patch for improved issue edit permissions		Closed	2011-01-25
Related to Redmine - Feature #2539: New project setting: mandatory/optional c...		New	2009-01-19
Related to Redmine - Feature #9700: Allow to configure the visibility of the ...		Closed	
Related to Redmine - Feature #9736: custom field visibility based on tracker		Closed	
Related to Redmine - Feature #3521: Permissions for roles to change fields pe...		Closed	2009-06-22
Related to Redmine - Feature #2500: configure custom fields as "required for ...		Closed	2009-01-13
Related to Redmine - Feature #12005: Mightful workflow field enhancement: hide		New	
Related to Redmine - Feature #393: Role that can't assign a ticket		Closed	
Related to Redmine - Feature #4707: private fields		New	2010-02-01
Related to Redmine - Feature #8313: Restrict Assignee List by Role		New	2011-05-06
Related to Redmine - Feature #10162: require notes on specific fields getting...		New	
Has duplicate Redmine - Feature #11329: Private custom fields		Closed	

History

#1 - 2011-05-07 20:46 - pasquale [:dedalus]

+1

fundamental feature for redmine: in real world more fields are only for developers, others for reporter...

#2 - 2011-05-08 13:03 - pasquale [:dedalus]

Terence Mill wrote:

I propose to remove them in favour of this ticket.
Hope that helps to clear some things and go forward with a solution.

I agree too: who can make this decision here? Etienne?

#3 - 2011-05-08 13:12 - pasquale [:dedalus]

dedalus - wrote:

I agree too: who can make this decision here? Etienne?

errata:

except for issue [#703](#) that isn't related to generic "set fields visibility\locking per user role"

#4 - 2011-05-08 14:33 - Terence Mill

[#703](#) is also covered, required fields can be set for all status for a role, if it should not be limited for one status only.

I will try to create a tigr wireframe prototype of the matrix gui for better imagination.

dedalu- wrote:

dedalus - wrote:

I agree too: who can make this decision here? Etienne?

errata:

except for issue [#703](#) that isn't related to generic "set fields visibility\locking per user role"

#5 - 2011-05-09 17:28 - Terence Mill

I make a first gui wire frame how it could look like.

In the upper table you see the standard redmine workflow transition matrix. Just below the advanced issue field configuration table can be dropped down, where field property (visible, read only, mandatory) can be set dependent on role and status. For this case you want to set field property for all status the same value, we could insert a button to help with this, copy from the first cell in first column

Notice that there is also a special role "author", this way rights and visibility of fields can be configured for the issue author whatever role he has. This way functionality from [#7444](#) is covered by configuration.

Also notice that the table contains all fields (means standard redmine fields - subject and description too - and of course all user defined fields of the chosen tracker).

The logic for the visible checkbox (field is visible) and radio button "read only" (not writable) and mandatory (must be set by role in given status) is as explained in issue description - see above.

See the [wire frame demo](#)

#6 - 2011-05-09 17:31 - pasquale [:dedalus]

Terence Mill wrote:

See the [wire frame demo](#)

good mockup

#7 - 2011-05-10 20:51 - Terence Mill

I did an update on the demo and fixed a bug, now there are 3 radio buttons.

All options for the field get active for the user if he has selected role and the status has the value of the column you do set the following field options.

- **visible** - this has to be checked in any case one of the following radio options can work. If it's not checked the user can't see the field at the issue form.
- **read only** - if this is checked user in selected role can only see the field (of course visible has to be checked also) but can't change value.
- **read,write** - if this is checked user can see and edit the field
- **mandatory** - the user has to set a value, if it's not already set. If it's set he can't just leave it or change it, if he wants.

Furthermore i added a drop down for every field, where one can set/change the order of the fields. At the moment there are some field in a on column layout at the top of the form and other are spread in a two column layout at the bottom. Not sure how to handle these assignment, but at least order in the two column layout could be configurable with this new control. Number in the drop-down equates the position top-down in the layout.

Any sugesstions and contrbutions to change or add this demo as visual specification are welcome.

#8 - 2011-05-18 15:48 - Terence Mill

Furthermore i added a drop down for every field, where one can set/change the order of the fields. At the moment there are some field in a on column layout at the top of the form and other are spread in a two column layout at the bottom. Not sure how to handle these assignment, but at least order in the two column layout could be configurable with this new control. Number in the drop-down equates the position top-down in the layout.

According to the configuration for column layout, there is piece of code which could be used and refactored to configure in which column the field shall be showed. See [Single column custom fields](#)

#9 - 2011-05-18 15:56 - Terence Mill

- File Screenshot0.jpg added
- File Screenshot1.jpg added
- File Screenshot2.jpg added

Screeners of the demo

Screenshot0.jpg
Screenshot1.jpg
Screenshot2.jpg

#10 - 2011-05-18 16:19 - Terence Mill

Terence Mill wrote:

Furthermore i added a drop down for every field, where one can set/change the order of the fields. At the moment there are some field in a on column layout at the top of the form and other are spread in a two column layout at the bottom. Not sure how to handle these assignment, but at least order in the two column layout could be configurable with this new control. Number in the drop-down equates the position top-down in the layout.

According to the configuration for column layout, there is piece of code which could be used and refactored to configure in which column the field shall be showed. See [Single column custom fields](#)

I thought about a mightyful approach to make the issue form layout completly configurable and i found it!

Being able to set issue form layout, would need a to configure table cell for every field.

E.g

field	column	row
title	1	1
subject	1	2
description	1	3
Status	1	4
Priority	1	5
Assignee	1	6
Category	1	7
Affected version	1	8
Start date	2	4
Due date	2	5
Estimated time Hours	2	6
%Done	2	7
Resolution	2	8

The algo to make a table layout of this is pretty simple. It has to search for all list entries with same row number and make a table with number of columns used in this rows. In the redmines standard issue form case (see table above) first 3 rows have one column layout, row 4-8 have 2 column layout and row 9 has one column again).

I will advance the [wireframe demo](#) with this new settings these days.

#11 - 2011-06-27 16:28 - Maarten Klerk

I am switching from Trac to Redmine. I would very much appreciate it if the issue described here will be included in a next version. I see it as a major drawback that I cannot prevent users to assign tasks to other users (even in the same project). Basic implementation could be to add a seperate right 'edit assignee'.

#12 - 2011-06-28 22:02 - Benjamin Bohn

- Assignee set to Terence Mill

When will this feature be released? Or is a plugin available?

#13 - 2011-06-28 23:28 - Terence Mill

- Assignee deleted (Terence Mill)

#14 - 2011-07-13 21:43 - Brian Heasley

+1

#15 - 2011-07-23 22:49 - Christian Köwing

+1

#16 - 2011-07-30 23:06 - Seth Sandler

Is this available somewhere? Is it just a mockup or is this actually working code?

#17 - 2011-07-31 15:10 - Terence Mill

Its a mockup for better requirements definition.

Seth Sandler wrote:

Is this available somewhere? Is it just a mockup or is this actually working code?

#18 - 2011-07-31 19:51 - Seth Sandler

This may be useful. It has some of the features and seems like it could be extended a bit to provide all of them.
<http://9thport.net/2011/03/20/redmine-hide-assigned-to-field-with-role-permissions-plugin/comment-page-1/#comment-11358>

#19 - 2011-09-09 11:31 - Mathieu Rochette

+1

we'd like to prevent non-member to set assigned to and priority

#20 - 2011-09-17 18:25 - Slawomir Kaimakami

+1 +1 +1
We need this so much...
For me and my company this is the most important functionality that is missing in Redmine.

#21 - 2011-09-20 09:48 - Tony Marschall

+1

#22 - 2011-09-20 11:51 - Pierluigi Soana

+1 Very useful

#23 - 2011-09-29 08:42 - Darko Lombardo

+1 A Must for usable Workflows

#24 - 2011-10-28 12:08 - Gurvan Le Dromaguet

+1

#25 - 2011-10-29 09:52 - Kasper Pagels

+1

Any news to when this will be available? This is the one and only reason why we struggle migrating fully to redmine. That is a shame since redmine is a powerful tool.

#26 - 2011-10-29 09:58 - Kasper Pagels

I can see here that I am able to edit only the status, assignee and percent done. How did you limit that?

#27 - 2011-11-03 09:35 - Sébastien Gripon

+1

#28 - 2011-11-17 16:50 - ja dwa

Hi,

I wonder about issue's fields permission solution. Is it hard to add such feature to redmine? Are You planing something like that? I am not talking about solutions like this [<http://9thport.net/2011/03/20/redmine-hide-assigned-to-field-with-role-permissions-plugin/>]. It is simple hide field but user still has access to this field. In this case user is able to write field using REST API (if it is enable) or just use similar url [[redmine/issues/\[number\]?auth_token=...&issue\[assigned_to_id\]=\[id\]](#)]. I am talking about real access controll to single field. Any news in this case?

Regards

#29 - 2011-11-22 20:59 - Mike Lees

+1

#30 - 2011-12-02 19:39 - Aaron Addleman

Hi Everyone,

I have modified my [plugin](#) to have a specific validation be run when changing the Assignee field and be controlled by a permission value of a role. I hope that this is a good starting point for something that I can improve upon in the future (possibly from some suggestions of people).

If you have time to share some thoughts on the [plugin page](#), please be kind as I am a Ruby noobie.

Cheers,
Aaron

#31 - 2012-01-06 12:49 - Gokay Gok

+1

#32 - 2012-01-23 13:35 - The 2nd

+1

#33 - 2012-01-24 10:57 - Dimitri Sapunou

+1

#34 - 2012-02-08 12:45 - Tobias Fischer

+1

#35 - 2012-02-15 12:59 - Tiemo Vorschuetz

+1

This is a great feature. Any ideas when this will be available?

#36 - 2012-02-27 09:31 - Bernard Steens

+1

#37 - 2012-03-06 19:41 - Leandro Guida

+1

#38 - 2012-03-06 21:57 - Daniele Galluccio

+1

#39 - 2012-03-07 08:07 - Anonymous

+1

#40 - 2012-03-08 16:57 - Anonymous

+1

Would be very useful for implementing roles like 'product manager'.

#41 - 2012-04-27 13:22 - Florent Fievez

+1

#42 - 2012-05-01 21:05 - Rabbit Seagraves

I love this, but would it also allow an admin to edit the default fields text? for example, we tend to estimate tasks by days, rather than hours.

#43 - 2012-05-01 21:53 - Markus M

+1

#44 - 2012-05-19 22:05 - Holger Winkelmann

Is there any progress implementing this or parts of the features described here. We are really missing a way to assign tickets either to roles or even a more flexible way

#45 - 2012-05-20 00:52 - Terence Mill

The function "assign issue to roles" is not part of this feature request.

This feature request is sadly not on the roadmap so far.

#46 - 2012-05-20 10:39 - Harald Glock

+1

#47 - 2012-06-02 12:43 - Terence Mill

All these features are covered by feature this feature and so far are dupes.

I propose to remove them in favour of this ticket.

Hope this helps to clear some things and go forward a solution.

- Feature [#3521](#): Add on/off permissions for roles to change fields in a tracker
- Feature [#2500](#): Configure custom fields as "required for status transition"
- Feature [#5067](#): Read only custom field
- Feature [#703](#): Configurable required fields
- Feature [#5011](#): Limit Visible Issue Fields Based on Permissions
- Feature [#5037](#): Role-based custom field visibility
- Feature [#582](#): Make fields mandatory/unmandatory
- Feature [#1091](#): Disabling default ticket fields
- Feature [#1360](#): Permission for adding an issue to a version
- Feature [#1919](#): Separate permissions for changing assigned-to, % finished and target version
- Feature [#2708](#): Require Category
- Feature [#7694](#): Require permission to assign a version to an issue
- Feature [#8313](#): Restrict Assignee List by Role
- Feature [#3726](#): Trackers per Role
- Feature [#3088](#): Estimated hours field able to hide role based
- Patch [#7444](#): Patch for improved issue edit permissions
- Thread [Require assigned to field for tickets set default assignee](#)
- Thread [Required fields depending on status](#)

Related Plugins

- [Redmine-Fields-permissions and Forks](#)
- [Redmine hide assigned to field with role permissions plugin](#)
- [Show/hide assigned to, Start date, Due date, Estimated hours, Priority](#)

#48 - 2012-07-15 18:26 - Jean-Philippe Lang

- File `workflow_permissions.png` added

Most of this request is now implemented for 2.1.0 ([#703](#), [#3521](#)). A new screen very similar to what Terence proposed lets now configure read-only/required fields by tracker, status and role.

Status transitions

Fields permissions

Select a role and a tracker to edit the workflow:

Role:

Contributor

 Tracker:

Feature

Edit

☐ Only display statuses that are used by this tracker

	Issue status					
	New	Confirmed	Assigned	Resolved	Closed	Reopened
Standard fields						
Project	<div></div>	<div></div>	<div></div>	<div></div>	<div>Read-only</div>	<div></div>
Tracker	<div></div>	<div></div>	<div></div>	<div></div>	<div>Read-only</div>	<div></div>
Subject	<div></div>	<div></div>	<div></div>	<div></div>	<div>Read-only</div>	<div></div>
Description	<div></div>	<div></div>	<div></div>	<div></div>	<div>Read-only</div>	<div></div>
Priority	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
Private	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
Assignee	<div></div>	<div></div>	<div>Required</div>	<div></div>	<div></div>	<div></div>
Category	<div></div>	<div>Required</div>	<div>Required</div>	<div>Required</div>	<div>Required</div>	<div></div>
Target version	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
Parent task	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
Start date	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
Due date	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
Estimated time	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
% Done	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
Custom fields						
Resolution	<div></div>	<div></div>	<div></div>	<div></div>	<div>Required</div>	<div></div>

#49 - 2012-07-16 10:22 - Terence Mill

Wow!. Great job. This is a major step forward using redmine for many other workflow projects beyond bug tracking only. Looking fowrad to try it our at demo system *m.redmine.org. At the moment there is no 2.1 version deployed.

Most of this request is now implemented for 2.1.0 ([#703](#), [#3521](#)).

Is there a field status visible? I mean it it possible to completly hide fields for some role in some status, where other can see it?

#50 - 2012-08-30 20:12 - @ go2null

Terence Mill wrote:

Is there a field status visible? I mean it it possible to completly hide fields for some role in some status, where other can see it?

Can anyone confirm that this patch does not provide the option to hide the field?
That is, there is not a "Visible" option.

#51 - 2012-09-03 16:05 - Gurvan Le Dromaguet

- File NoRedStarForMandatoryField.png added

I had a test today installing trunk version on my workstation : great job !
My comments:

- The "hidden" value would really be great indeed.
- We now have two ways to set a custom field mandatory : via Admin->Custom fields or via this new feature at Workflow->Fields Permission

For now, I am trying to code a patch for the hidden attribute capability

#52 - 2012-09-04 19:33 - # And

Gurvan Le Dromaguet wrote:

I had a test today installing trunk version on my workstation : great job !
My comments:

- The "hidden" value would really be great indeed.
- We now have two ways to set a custom field mandatory : via Admin->Custom fields or via this new feature at Workflow->Fields Permission

For now, I am trying to code a patch for the hidden attribute capability

This would be great. **Jean-Philippe Lang**, why do not realize it in [2.1.0](#)?

pasquale [:dedalus] wrote:

+1

fundamental feature for redmine: in real world more fields are only for developers, others for reporter...

It is true. User does not need the much fields, often it is just the status and the date. Or just status. =)

#53 - 2012-09-21 12:48 - Esben Haabendal

Gurvan Le Dromaguet wrote:

For now, I am trying to code a patch for the hidden attribute capability

Any news on this? I would be happy to help you test it :-)

And it would be really great if it could make it into 2.2.0. Together with [#1554](#) it would make Redmine much more suitable for setups where you have 3 parties using the same Redmine. Internal developers, project management, and external customer/client.

#54 - 2012-09-22 03:38 - Abdul Halim Mat Ali

I have upgraded to 2.1. Isn't the attributes hidden when you set it to read only?

#55 - 2012-09-24 07:04 - Brian Lindahl

A very important use case is still not covered in the 2.1.0 implementation:
Reporter creates two defects, A and B
Software Lead assigns defect A to Engineer1 and defect B to Engineer2

With the current proposal (and in 2.1.0), there is still no way to allow Engineer1 to edit defect A, but prevent him from editing defect B. You can prevent status changes in 2.1.0, but you can't prevent editing in 2.1.0 (nor in this proposal).

The missing component is having three sets of field configurations, like there are for status changes:

- 1) all issues
- 2) authored issues
- 3) assigned issues

As such, patch [#7444](#) is still necessary.

#56 - 2012-09-28 12:29 - Gurvan Le Dromaguet

- *File workflow_hidden_field.diff added*

Esben Haabendal wrote:

Gurvan Le Dromaguet wrote:

For now, I am trying to code a patch for the hidden attribute capability

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I went over a lot of wrong way to do it as I am really not expert in ruby/rails.
However I finally had something that looks like working (however not sure that the hidden works good for "native" fields)
Please find attached a patch to test on 2.1 (tested on 2.1 branch at release time)
surely not perfect coding, feedbacks/improvements are welcomed !

#57 - 2012-10-01 23:59 - # And

Gurvan Le Dromaguet wrote:

Esben Haabendal wrote:

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Please find attached a patch to test on 2.1 (tested on 2.1 branch at release time)
surely not perfect coding, feedbacks/improvements are welcomed !

Works fine on trunk. **Gurvan Le Dromaguet**, maybe create issue in order to developers apply your patch?

#58 - 2012-10-02 00:03 - # And

Gurvan Le Dromaguet, it is only solution for custom fields?

#59 - 2012-10-02 11:27 - Gurvan Le Dromaguet

- File *workflow_hidden_field_v0.03.diff* added

Ok, I will submit the patch after a short testing period on my side
Attached new version, added the possibility to hide the Default fields too + found where to set a color in the workflow permissions panel for "hidden" :)
Can you apply this and confirm it works ? Thanks in advance !

#60 - 2012-10-02 12:05 - # And

Gurvan Le Dromaguet, OK, I'll test it today. Additionally, I create new task about hide fields on workflow ability [#12005](#).

#61 - 2012-10-27 10:54 - Jean-Philippe Lang

- Status changed from New to Closed

I'm closing it in favour of [#12005](#) now that the read-only/required part of this request is implemented.

#62 - 2012-10-31 04:48 - Steven Wong

Nice. waiting for the next stable release.

the field with status could be set as Required, visible , disvisible or read-only. it would be much more better.

Thanks.

Jean-Philippe Lang wrote:

I'm closing it in favour of [#12005](#) now that the read-only/required part of this request is implemented.

#63 - 2012-11-20 12:07 - Heribert Steuer

Hello,

first of all thanks alot for this patch, helps alot to cover our usecases!

I just applied *workflow_hidden_field_v0.03.diff* to Redmine 2.1.3. It seems that the field permissions are screwed up somehow. Here are the results of my first tests:

Setting field to "" displays the field as optional (okay)
Setting field to "Read-only" hides the field (not okay)
Setting field to "Hidden" displays the field optional (not okay)
Setting field to "Required" displays the field as mandatory (okay)

The patch itself applied without any problems but it might still be related to the version of redmine I've used. Did anyone get into this as well?

Thanks alot,
Heri

#64 - 2012-11-20 12:21 - Heribert Steuer

btw, the above only applies to the "New issue" form. The issues display itself seems to work as expected.

#65 - 2013-01-21 10:21 - Jai prakash

I applied `workflow_hidden_field_v0.03.diff` patch . The patch applied without any errors and it hides the fields . But while updating the issue the hidden fields are showing and i am able to update those fields.Is this a bug ? I mean if a field is hidden it should not be available for editing too right?

#66 - 2013-01-21 10:32 - Gurvan Le Dromaguet

jai prakash wrote:

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Hello,

This ticket is closed and a separate item has been created to track the "hiding" functionality:

<http://www.redmine.org/issues/12005>

You will find there more recent and complete patches, please try these first.

#67 - 2013-01-21 10:49 - Jai prakash

jai prakash wrote:

I applied `workflow_hidden_field_v0.03.diff` patch . The patch applied without any errors and it hides the fields . But while updating the issue the hidden fields are showing and i am able to update those fields.Is this a bug ? I mean if a field is hidden it should not be available for editing too right?

OOPS sorry my bad . Please ignore this . I see that [#12005](#) has it resolved .

#68 - 2014-03-06 11:10 - Luis Serrano Aranda

+1

#69 - 2014-07-24 04:22 - Michael Sanders

Is it possible to hide fields on the initial creation of an issue, but show them when editing an item?

I want it to be easier (read: less daunting) to create an issue in Redmine, by hiding fields that are only useful later on. I'd like to hide the fields upon creation, but show them when the issue is created and when the user is editing it.

#70 - 2014-07-24 09:35 - Daniel Felix

yes, it is. Just show these fields as read only for the status new in the workflow.
but beware! Required Fields should be visible. You can't hide the subject for example if this is needed.

#71 - 2014-07-24 15:10 - Michael Sanders

Thank you Daniel, I gave these patches a try and did as you said last week, but I may have not done it correctly. I will try again.
The fields I'd like to hide are not required, Parent Task, Estimated Time and Target Version. I'd like them to be shown after an issue is created.

#72 - 2014-07-24 16:50 - Michael Sanders

Daniel,
Thanks for your help. I implemented the patch, and was able to hide Parent Task, Estimated Time and Target Version on initial creation.
However, I find that these fields cannot be seen by non-Administrators after issue creation. These fields need to be viewable by non-Administrators after their issue's creation.

Additionally, I am trying to hide a custom field on initial creation, this patch does not seem to be allowing me to do that. I have the fields set as Read-Only or Required, based on their status. Should this work?

#73 - 2019-05-16 05:46 - Sky Stalker

https://github.com/Neticoa/redmine_workflow_hidden_fields
http://www.redmine.org/plugins/redmine_workflow_hidden_fields
this plugin can solve the problem

Files

Screenshot0.jpg	23.1 KB	2011-05-18	Terence Mill
Screenshot1.jpg	65.3 KB	2011-05-18	Terence Mill
Screenshot2.jpg	344 KB	2011-05-18	Terence Mill
workflow_permissions.png	13.7 KB	2012-07-15	Jean-Philippe Lang
NoRedStarForMandatoryField.png	49.2 KB	2012-09-03	Gurvan Le Dromaguet
workflow_hidden_field.diff	4.79 KB	2012-09-28	Gurvan Le Dromaguet
workflow_hidden_field_v0.03.diff	8.73 KB	2012-10-02	Gurvan Le Dromaguet