WorkPool v4.4.018 - Release Notes

2010/04/21

Directory

- Fixed issue where hierarchal (parent) Tasks could not be collapsed when viewing a Directory Folder's Task History.

Activities

- Incorrect Tooltip message was fixed when hovering over the "Run Report" icon located in the Activity Panel when viewing a Task.
- A new Activity Panel has been added to the Activity section on the Show Task screen, comprising the functionality of sending an email/text message, adding of Calendar events and running reports. The "Pause Duration" field has also been renamed to "Time Deferred" and is made visible by clicking on the blue button next to the "Time Started" field.
- A new feature has been added to the User Profile screen, called "Custom Interface Settings". This new screen will allow a user to configure the size of the Activity description box by selecting from two given dimensions (Default or Large) and the option to specify a custom size to enter the width and height combination. A user can also specify if the "Time Taken" on Activities should be a required field, but this option can be disabled (overridden) if the system property is set under Task Properties; see Task Administration for more information.
- The "Time Started" field, as found under the Activities section on the Show Task screen, is now also visible on the "Add Activity" screen, including the renamed field – "Time Deferred". The Description box will be determined by the User Profile setting under "Custom Interface Settings".

Email / SMS

- Fixed issue where empty (invalid) mobile numbers was stored under an Electronic Folder's Communications, and as a result being able to use these invalid mobile numbers to send out text-messages.
- Email attachments were lost when composing a new email message and selecting a template afterwards, containing attachments or not, but all attachments are now retained. If a template already contains attachments, then these will also be attached (multiple attachments).
- Message notes have been changed for the audit train to be more accessible and easier to understand. These notes are visible in the form of an icon located in the top right-hand corner of the screen, anywhere a message can be viewed – including the following locations:

- o Email in Inbox from the "My Email" screen
- o The sending of an email and/or text-massage from the Folder History
- o The sending of a draft email
- o Task history, on the Show Task screen. Text-Message notes can also be accessible from this screen
- WorkPool email client now supports mailboxes to be configured for Gmail (secure) accounts, allowing the usage of Gmail's POP (SSL), IMAP (SSL) and SMTP services.

Dashboard (Intranet Home)

- Fixed issue where Task numbers were not recognized, thus unable to access the Task directly, when using the WorkPool syntax [TASK:XXX] in the Announcement section.

Processes

- Fixed error messages when trying to open either the "Process Definition" or "Attribute Name" links located when editing a Process Definition's "Option" attributes.

Tasks

- Fixed issue where Tasks were not being reactivated (received and in progress) upon Activity submission. Tasks can be reactivated under the following circumstances:
  - o The "Assigned-To" submits an Activity on a completed Task
  - o If the "Requested-By" signs-off a Task and the "Assigned-To" submits an Activity
  - o The "Requested-By" submits an Activity
  - o The "Assigned-To" submits an Activity on an archived Task
- Fixed issue where a Task's status could not been set to "Delayed" from the Activity panel. The status can be changed either from the "Edit Task" screen or from the Activity panel (show Task screen).
- The "Date" section on the Show Task screen has undergone some changes to increase readability. These changes includes the following:
  - o If the Next-Action date is in the past, the date will become red
  - o If the Next-Action date is in the future and the Due-date is in the past, the date will become orange
  - o If the Due- date and time is in the past and the Task is active, the date will become red
  - o If a Task is completed and the Completed-On Date is past the Due date, the Completed-On date will become red
- Task Escalation has undergone major changes to improve communication and visualization when escalation has taken place. The escalation function has taken the form of an icon located

below the Activity section on the Show Task screen, which becomes animated upon escalation to visually alert the user that the Task has been escalated. Rules that govern escalation includes the following:

- o Only active Tasks can be escalated
- o Only associated parties can escalate a given Task, i.e. the Owner, Resource (assigned to) or Resources in the case of Resource Groups.
- o A task cannot be completed if it is escalated and must first be de-escalated to indicate what the outcome of the escalation was.
- o Processes (instances) cannot be escalated, but Process bound Tasks however can
- The new escalation screen contains the following functionality:
  - o Area for the user to state the reason for escalating the Task
  - o The current status of the Task being escalated
  - o Selecting from three types of escalation taking place, including the following: A Problem May Occur; Situation Demands Your Attention; Needs Decision or Instruction.
  - o Setting the Next-Action date upon escalation
  - o Notification support: Here the Owner, the Resource and/or other additional Resources can be notified of the Task being escalated. Communication can either take place via email, text-message or both.

Task Administration

- A new feature has been added under the "System Functions" section, allowing an Admin user to archive Tasks in bulk, labeled "Archiving of Tasks (Bulk)". Multiple Tasks can now be archived according to certain date ranges of completion (sign-off) and choosing which resources' tasks to archive. The total Tasks that can be archived are displayed for each resource with a sum total of the selected resources' Tasks to archive, but also displaying the grand total of all un-archived Tasks currently in WorkPool. Tasks with the sensitivity of "Private" or "Confidential", or linked to a Personal folder, can also be archived. Performance rules has also been put in place to insure that no more than 500 Tasks can be archived at once, ensuring optimal server performance.
- A new field has been added to Task Properties, called "Make 'Time Taken' a Required Field on Activity" to set the system property, i.e. making Time Taken on Activities a required field for all users. The same functionality will be deactivated in a new section under User Profile, called "Custom Interface Settings", if this option is selected.

Administration

- A new field has been added in the Resource Profile Settings screen for both Internal- and External Resources (Resource Management), labeled "Allow Access to Resource Groups for". This new field makes it possible to configure access to multiple Resource Groups for a specific

resource, where previously one would have to open each Resource Group and add the resource to have access to.

Calendar

- Calendar events now features an Audit Trail function that records any changes made and actions taken by resources.