

WORKPOOL RELEASE NOTES

WorkPool Version : 4.4.3.019
Release/Batch Number : 66270

Internal Build Date : 2010/09/14
Prepared By : Eduan Naudé


Summary of Modules / Components Affected:

Module Changed/Affected	Significance of Change
Tasks & Activities	Major
Communications (Email & SMS/Text Message)	Major
Directory	Minor
Calendar	Minor
Items	Minor

CHANGE LOG DETAILS

TASKS AND ACTIVITIES

1. Bug Fixes





- 1.1. Adding Activities that are not linked to tasks (standalone), now appears on the “Last 15”  panel.
- 1.2. Fixed Task Status when editing an escalated Task. Now retains escalated status while editing a task.
- 1.3. Expanded the rule of signing-off Tasks with open Activities to the Task Edit screen, meaning that, if a task contains open/active Activities, the sign-off option will not displayed on the task Edit screen from the “Task Status”. The new Task Panel has also been equipped with checks to prevent Task sign-off with open/active Activities. Please note that Tasks that has been signed-off can still have open/active Activities linked to them at a later stage.
- 1.4. Fixed email notifications on Task Escalations.
- 1.5. Fixed the “Time Taken” field on the email screen to be configurable as on the activity panel. The new configurations can be found on the User Profile screen under “Custom Interface Settings” and Task Administration under “Task Properties”.

2. New Task Action Panel

- 2.1. The functions on the Show Task screen has been consolidated in one task panel to make the interface more context sensitive, providing the users with typical or suggested actions such as completing, signing off, archiving of tasks (typical life-cycle actions) as well as administrative functions that are available to administrators only. The idea was to separate task related actions from the activities section.
- 2.2. The new Task Panel is located at the top, next to the task number and also below the activity panel. The Task Panel looks as follows:



The panel also consists of the following new buttons:

-  The task can be signed-off if the user is the owner of the task.
-  The “Freeze Task” button will now mark tasks as Delayed.
-  Edit a task if the user is the owner of the task.
-  Archiving a task. This icon will not be displayed if the user’s archiving settings are enabled on the Personal Task Settings screen under the User Profile section.

3. Task Search can now search Attribute instances from Processes

- 3.1. A new “Process Attributes only” search criteria has been placed on the Task Search screen to search attribute values from process instances.
- 3.2. There is also a advanced search on process attributes to allow the user to narrow searches on specific processes, attributes types, etc.

SEARCH FOR TASKS OR ACTIVITIES

Search For : **Search**

Tasks and Activities
 Tasks only
 Activities only
 Process Attributes only

Sort Order : Sort Descending
 Sort Ascending

[Advanced Task Search](#)
[Process Attributes Search](#)

New search criteria for process attributes on the Task Search screen

SEARCH ON ATTRIBUTE INSTANCES

Search for these words (optional):

Exact match as a phrase only, do not search as keywords

Process Scope

All Processes

Limit to Process: Sales Process

Search all Versions

Select Process Version : 1.0

Search for All Types

Limit to Following Attribute Types :
 AddressInternational
 AddressLocal
 Boolean
 Date
 DateTime
 Decimal
 DirectoryEntry
 EmailAddress
 Integer
 MobileNumber

Sort Order : Sort Descending
 Sort Ascending

Process Attribute Search screen for more advanced searching

4. Updated the Resource Performance Task Summary Report screen

- 4.1. Improved the screen layout when displaying a resource's Task Status Report, i.e. when clicking on a resource's name.
- 4.2. Changes include displaying the resource's name and date range in the title, each table is now sorted alphabetically and improved alignment.

5. Improved layout on Documents Panel

- 5.1. The documents panel located on the Show Task screen has been updated to display documents according to specific section, e.g. Task, Activities, Emails, etc., and the date/time it was attached.
- 5.2. Attachments in each section are sorted according to the date they were uploaded.

Dates

Created On : 2010/09/21 16:32
Next Action : 2010/09/21 17:18
Due On : 2010/09/21 16:32
Time From Due Date : 0
Date Completed : Not Completed
Archived : No

▶ Metrics

▼ Documents

Task
DirectoryReport.txt 2010/09/21 16:32

Activities
Group_Task_Report.DQY 2010/09/21 17:18
JAD Notes.docx 2010/09/21 17:17

Emails
View_Layouts_v1.1.xlsx 2010/09/21 17:17

Naudé on 2010/09/21 17:17 (2 min - N/A)

ITEMS

1. Bug Fixes


- 1.1. The Edit Item screen now retains attachments, like the Item Document and Item Picture, if a user error occurs on the screen, e.g. if a required field is left empty upon saving changes made.

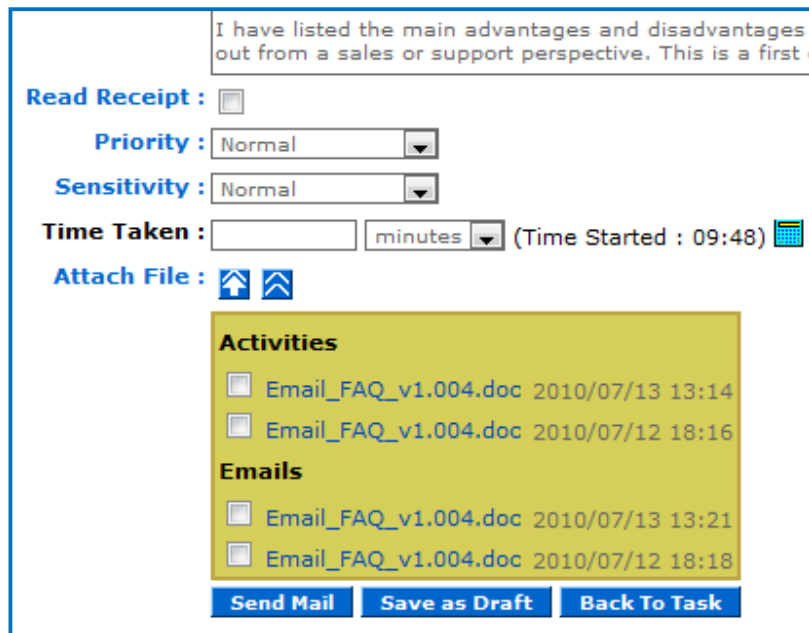
EMAILS

1. Bug Fixes

- 1.1. The Guess Task function on email messages received through IMAP has been corrected. Where the Guess Task displays the title and detail of a private task, but when the Import Message button is clicked, the task becomes private and the title can no longer be read.
- 1.2. Resources must now have a valid/active email address defined under their account to use Task Notifications.
- 1.3. Error messages under the linked Entry's Folder History has been corrected when HTML formatted email messages contains WorkPool expressions. Another correction was made when replying on a email message and changing the content type from HTML to Plain Text, then cancelling the content change and selecting the HTML format again, which resulted in the body of the message containing HTML tags.
- 1.4. Fixed alignment of the Personal Folder icon on the Email screen.

2. New button to attach related files to an email

- 2.1. A new “More Documents”  button has been added to the Send Mail Message screen.
- 2.2. This button displays a dropdown of all documents related to the specific email message, by looking at the linked Directory Entry, Task, Calendar Events, etc. For example, if an email is linked to a Task and the Task has a file attached to it, then the same file will be visible from this list. The same concept applies to other sections relating to the email message, e.g. attributes on View of the linked Entry, etc.





I have listed the main advantages and disadvantages out from a sales or support perspective. This is a first o

Read Receipt :

Priority : Normal

Sensitivity : Normal

Time Taken : minutes (Time Started : 09:48)

Attach File :  

Activities

- Email_FAQ_v1.004.doc 2010/07/13 13:14
- Email_FAQ_v1.004.doc 2010/07/12 18:16

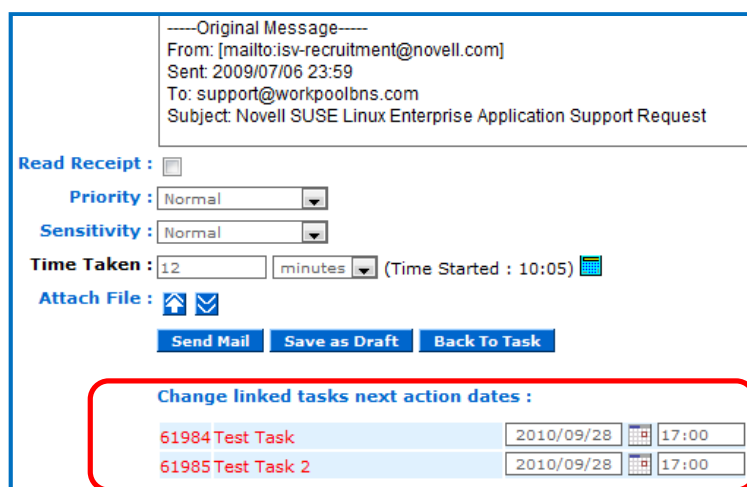
Emails

- Email_FAQ_v1.004.doc 2010/07/13 13:21
- Email_FAQ_v1.004.doc 2010/07/12 18:18

Send Mail **Save as Draft** **Back To Task**

3. Setting Next-Action dates when sending emails

- 3.1. The Next-Action dates of tasks linked to an email message, where the author of the message is also a resource on the linked tasks, can be set on the Send Mail Message screen.
- 3.2. All tasks with changes Next-Action dates will also be displayed on the Send Message To screen, i.e. the screen displaying confirmed recipients before sending off a message.





-----Original Message-----
From: [mailto:isv-recruitment@novell.com]
Sent: 2009/07/06 23:59
To: support@workpoolbns.com
Subject: Novell SUSE Linux Enterprise Application Support Request

Read Receipt :

Priority : Normal

Sensitivity : Normal

Time Taken : 12 minutes (Time Started : 10:05)

Attach File :  

Send Mail **Save as Draft** **Back To Task**

Change linked tasks next action dates :

61984 Test Task	2010/09/28	17:00
61985 Test Task 2	2010/09/28	17:00

Send Message To

Specify Recipients :
 isv-recruitment@novell.com : WORKPOOL (SEVENTH SENSE TECH) - MA [X] [📧] [📧] [📧]

[Send Mail to Recipients](#) [Back](#)

Task Next Action Dates to be changed :

Task No	Task Title	Next Action
61984	Test Task	2010/09/28 17:00
61985	Test Task 2	2010/09/28 17:00

4. Improved Calendar Activities on Tasks and keeping a audit trail of declined invitations

4.1. Email notifications sent as a result of a resource declining the invitation is now automatically linked to the task the calendar event is linked to. Declined invitations are also recorded against the event’s Audit Trail.

5. New Email Rules Processor: Out-of-Office and automatic Task creation

5.1. Two email rule processors has been add on the mailbox configuration screen to allow a user to configure either one of the following rules for their mailbox:

- Out of Office Mailbox Rule
- Start a Task Mailbox Rule

Settings | **Mailboxes** | Signature

Id	Server	Username	Protocol	SMTP	Enabled	Default	Rules	Last Scan
9	imap.gmail.com	workpooltest@gmail.com	pop3	smtp.gmail.com			Edit	2009/07/12 18:57

[Add Mailbox](#)

Mailbox Rule Processor

Choose new Mailbox Rule Processor to configure :

Out of Office Mailbox Rule

Start a Task Mailbox Rule

[Continue](#) [Back](#)

5.2. The Out of Office Mailbox Rule is used to configure automatic “Out-of-Office” replies based on the user’s rule configuration.

Out of Office Mailbox Rule

From Date : 2010/09/30 14:00

To Date : 2010/09/30 17:00

Email Template to use for Response : None Selected

Link the auto-response message to folder : [Folder Selection]

Ignore messages sent from internal WorkPool users :

Conditions :

- All emails received on this mailbox
- Only emails from email addresses that exist in my WorkPool and/or the email containing a valid Task number
- Only emails sent to this mailbox, where my address is in the To or Cc field list
- Only emails received from the following email addresses (use semi-colons as separator)

Save Rule **Back**

5.3. The Start a Task Mailbox Rule allows a resource to create a task template which will be used to automatically create a task based on specific rules when an email is received.

6. Audit Trail when linking an email message to a Directory Entry

6.1. A Message Audit Trail is now kept on received emails when a resource links it to a electronic folder and/or task.




CALENDAR

1. Bug Fixes

- 1.1. Archived tasks are now displayed under Commitments for the Day.
- 1.2. Fixed the issue where the manager of a calendar event does not have an email address specified under his/hers user profile, which resulted in an error message when attendees decline the invitation, thus sending out the notifications to an empty email address.

2. Improved Calendar Event layout on Task History


- 2.1. The layout of a Calendar Event on its linked task (under Task History) has also been improved to show more information like that of location, objective, date & time, and all invitees, including their statuses. Attachments on the event are also visible from here and will also be listed under the improved Documents tab.

 **Some random event**  

Location : Boardroom

Objective : Discuss some new developments and strategies.

Date & Time : 2010/09/28 10:00 To 2010/09/28 11:00

Reference Documents :  file.doc

Invitees :

Eduan Naudé	Accepted
Marius Botha	Declined
Pierre Norden	Accepted

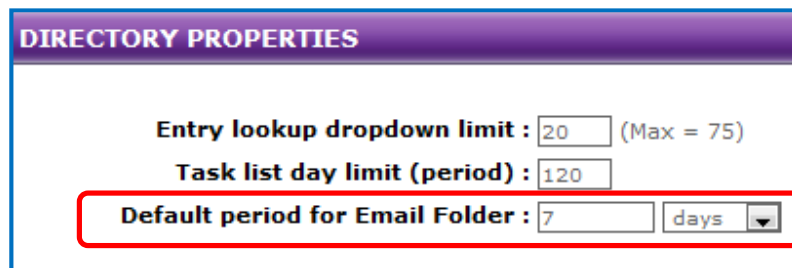
DIRECTORY

1. Bug Fixes

1.1. Improved the performance when opening the email folder of an entry's Folder History, especially if it contains a large number of email messages.

2. New Directory Property to set the duration of the email folder

2.1. A new property was added to the Directory Properties screen under Directory Administration to set the default duration for emails under the Folder History.



DIRECTORY PROPERTIES

Entry lookup dropdown limit : (Max = 75)

Task list day limit (period) :

Default period for Email Folder : days