

WORKPOOL RELEASE NOTES

WorkPool Version : 4.4.3.020
Release/Batch Number : 66270

Internal Build Date : 2010/10/21
Prepared By : Eduan Naudé

Summary of Modules / Components Affected:

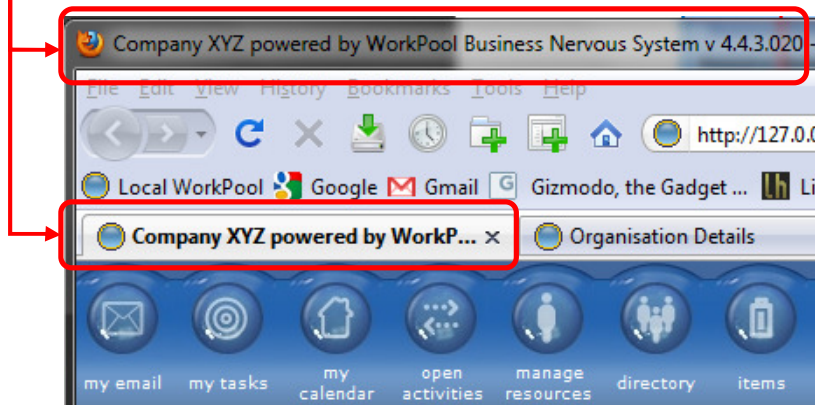
Module Changed/Affected	Significance of Change
WorkPool System Administration	Major
Tasks & Activities	Major
Communications (Email & SMS/Text Message)	Major
Directory	Medium
Process Management	Minor
Calendar	Minor
Items	Minor
Files	Minor

CHANGE LOG DETAILS

WORKPOOL SYSTEM ADMINISTRATION

1. System Administration Interface Look-and-Feel Updated

- 1.1. Updated the entire administration interface with a new theme. Menu items and groupings updated.
- 1.2. A new menu group has been added called "Organisation Management". Under this group a new menu item was added namely "Organisation Details". This allows the system administrator to add the name of the organisation (company or department) and then display it in the Internet browser's title bar. This is useful for people who work on more than one WorkPool at the same time. See screenshot below for details.



2. Resource Management: Internal Resources

- 2.1. The Resource List screen now displays the amount of user licenses still available for use based on your subscription (top-right side of screen).
- 2.2. A “tab” layout has been implemented to differentiate between “Active” and “Inactive” users with the option to view “All” (both) at the same time. The same layout has been applied to the External Resources section. Clicking on a Resource will open a new Resource maintenance screen where you can view the details and settings for a resource now grouped per function.

Active	Inactive	All	
Display Name		First Name	Surname
		Chandre	Laubscher
		Deon	Blom
		Eduan	Naudé
		Ferdie	Van Schalkwyk

- 2.3. The “Add New Resource” screen has been simplified by breaking it up into separate functions. Administrators now have a simple screen to add or update Personal Details (minimum required). Two new fields have been added to allow for the upload of a profile picture as well as a copy of the resource’s Identification Document (ID).
- 2.4. The Resource Maintenance screen now separates the functions that can be performed on a Resource into the following sections, where each section can now be edited on its own without updating the entire screen:
 - 2.4.1. Personal Details
 - 2.4.2. Notification and Communication Details
 - 2.4.3. Time Management
 - 2.4.4. Security and Permissions
- 2.5. The Resource Migrate and Activate/Deactivate functions have also been updated. They now feature a screen called “Resource Responsibilities Confirmation” (see screenshot below) where the impact of such an action can be assessed and managed. Actions can then be taken to reassign tasks, change group memberships, manage recurring tasks or outstanding Calendar Invitations. In addition this function will now [take automatic action](#) to disable the resource’s mailboxes.



Resource Responsibilities Confirmation

● Notification and Communication Settings

Following Mailboxes will be Deactivated : workpooltest@gmail.com

Email Used for Notifications : workpooltest@gmail.com

Mobile Number Used for Notifications : 084123456

● Workflow

Total Unarchived Tasks (Owned) : 716

Total Open Tasks (Assigned) : 495

Total Open Activities : 43

Future Calendar Events : 2

● Roles/Responsibilities

Total Recurring Tasks (Owned) : 30

Total Recurring Tasks (Assigned) : 13

Total Folder Listeners (Owned) : 1

Total Folder Listeners (Assigned) : 1

Total Processes (Owned) : 5

Total Resource Groups Managed : 13

Total Resource Groups Quality Assured : 2

Total Item Locations Managed : 3

Total Item Categories Managed : 3

Total Business Units Managed : 4

● Resources will be Removed from Following Groups

Resource Groups : Accounts and Billing
Backups
Debit Orders

Directory Permission Groups : Default View Admin Access
Directory Access

Item Permission Groups : ADMIN
USER

Document Root Folder Membership : DAGAN International
SE7EN / WORKPOOL
SE7EN Exco
Shared - Partners

[Deactivate](#)

[Back](#)


3. “My Profile” section updated under normal user interface (non admin)

3.1. Implemented the same look-and –feel as found under the WorkPool administration section.



TASKS & ACTIVITIES

1. Minor Changes and Bug Fixes

- 1.1. Adding of standalone Activities (that are not linked to tasks, only to folders) now appear in the “Last 15”  panel when saved.
- 1.2. Task Status now retains its escalated status while editing a task, unless the owner chooses to change it.
- 1.3. The rule that prevents tasks from being completed or signed off while it still has activities linked to it that is open is now also enforced on the Task Edit screen. If a task contains open activities, the sign-off option will not be listed in the Task Status menu located on the Task Edit screen. The new Task Panel (see below) has checks to prevent a task from being signed-off with open activities. Please note that tasks that have been signed-off can still have activities linked to them at a later stage.
- 1.4. Bug fix: Email notifications on Task Escalations now going to all specified party/ies, not only the Task Owner. These notifications are now automatically linked to the same Entry Folder as the Task.
- 1.5. Recursive Task relationships are no longer allowed, i.e. Parent tasks can no longer be linked to one of its direct child tasks in the task hierarchy. This type of relationship caused a recursive loop which affected the Historic Tasks screen (Folder History). Please note that a parent task can (at this stage) still be linked 2 levels down the hierarchy, i.e. Task A is the parent of Task B, Task B is the parent of Task C, Task C can still be the parent of Task A but Task B cannot be the parent of Task A.
- 1.6. The Task Classification report (see Task Reports under Task Administration) now allows for an empty date range filter (no start and/or end date range required).
- 1.7. When deleting a task (in systems that allow this function) a confirmation page is now displayed.
- 1.8. The “Resource Group Management” has now moved to the Task Administration section (no longer under System Administration).










2. New Task Action Panel

The icons previously displayed at the top of the View and Edit Task screens have been consolidated into a single “Task Action Panel”. All functions are now located in one place (no longer on both the top-left and top-right corners of the screen). The new Task Panel is located at the top-left of each task screen, typically next to the task number and also at the bottom below the activity panel (if applicable). The Task Panel looks as follows:



This panel is **context sensitive**, i.e. it will change automatically and display only the functions available to the person viewing the task based on his/her role and the status of the task. For example you will not have a Sign Off icon if you are not the owner of the task, or cannot unfreeze a task that is not currently frozen (previously known as “Delayed”). The panel will provide the users with typical or suggested actions and shortcuts such as completing, signing off or archiving of tasks (typical life-cycle actions) as well as administrative functions that are only available to administrators. The Task Action Panel and Activity Action panel are now two distinctly different panels that provide functions pertaining only to the entity they represent.

The Panel now features the following new buttons:

-  Task Escalate icon now moved from the bottom of the page to the panel.
-  Task is in Transfer indicator. Only the resource the task is being transferred to will see this button on the panel. When clicked on the icon will take the resource to the section on the screen where he/she can accept or decline ownership.
-  Allows the owner of a Task to sign it off directly from the Show Task screen. It is not longer necessary to go to the Edit screen to do this.
-   The Freeze Task and Unfreeze Task icons now replace the status previously known as “Delayed”. Tasks marked as Frozen indicates that the resource is not working on them at the moment because they are waiting for information from another party or cannot continue on it at present. The task will then be Unfrozen when this information is received and the resource will continue working on it.
-  This icons replaces the Edit Task icon – available only if the user is the owner of the task.
-  Archiving a task that has already been signed off. This icon will not be displayed if the owner’s archiving settings are enabled on the Personal Task Settings screen (see User Profile section) since archiving takes place automatically. This icon is only available to the owner.
-  Task Tracker icon moved from the bottom of the page to the panel.
-  The “View Process Diagram” icon can now be found on the panel when the task is a Process.

3. Task Search

- 3.1. A new “Process Attributes only” search criteria has been added to the default Task Search screen. This will allow users to search on attribute values within processes. E.g. if you have an attribute on a process called “ID Number” you can now search on this value and locate the process using this feature.

SEARCH FOR TASKS OR ACTIVITIES

Search For :

Tasks and Activities
 Tasks only
 Activities only
 Process Attributes only

Sort Order : Sort Descending
 Sort Ascending

[Advanced Task Search](#)

3.2. There is also an extended/advanced search option for attribute values on processes which allows the user further define the search criteria on specific processes or based on attribute types, etc.

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:

Search all Versions

Select Process Version :

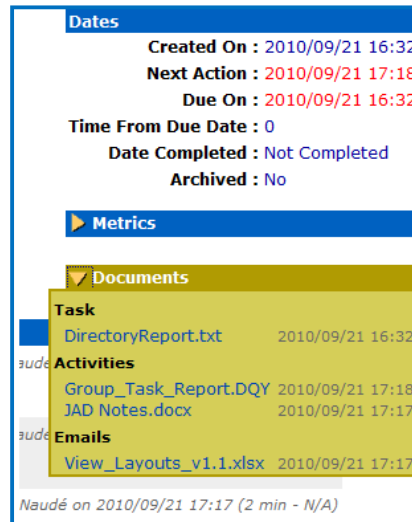
Search for All Types

Limit to Following Attribute Types :

Sort Descending
 Sort Ascending

4. Documents Panel on Show Task screen changed

- 4.1. The Documents panel located on the Show Task screen has been improved to now group and display documents according to specific sections, e.g. Task, Activities, Emails, etc. and the date/time it was attached (age).
- 4.2. Attachments in each section are sorted according to the date they were uploaded with the latest at the top (see example below).



5. Resource Task Status Report Updated

- 5.1. The screen layout was improved. This report is accessible as a drill down on every resource from the "Resource Performance Task Summary Report" screen. Changes include displaying the resource's name and date range in the title, each table is now sorted alphabetically.

6. Recurring Tasks

- 6.1. Recurring Task Audit Trail/Notes: Each Recurring Task will now record any changes to the scheduler in its audit trail. Changes and other notes can be viewed by clicking on the "Audit Trail" button on the Edit screen. The button will only appear if notes exist.
- 6.2. Reassign Recurring Task Ownership: This new feature, found under Task Administration, will allow an administrator to view each person's recurring tasks (where that person is the owner of those recurring tasks) and then transfer ownership to another person. This will allow the administrator to move recurring tasks (in bulk) should the current owner be absent or no longer responsible for it. As per the example below, the new screen will allow the administrator to choose a resource in the "Select Manager" field. Once selected, the recurring tasks for this resource will appear. The user can make a selection of tasks to transfer and then choose the new owner from the "Select New Manager" field before clicking "Save". The recurring tasks will now appear under the new owner's list of recurring tasks and when this recurring task kicks off in the future, the new recurring task owner will

then become the owner of the task that is created. Any transfer of ownership will be recorded in the recurring task's audit trail and an email notification will be sent (where possible) informing the new owner of the change. Recurring Task Ownership can also be transferred by its current Owner using the feature mentioned below.

REASSIGN RECURRING TASK OWNERSHIP

Select Owner :

Recurring Task	Due	Duration	Active	[]
[RT] Check WorkPool Website	2011/07/28 09:01	15 min	<input checked="" type="checkbox"/>	<input type="checkbox"/>
[RT] Projector Maintenance - 6 Weekly Check	2011/08/04 09:00	0 min	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Select New Owner :

6.3. Manage Recurring Tasks: A new button called “Manage Recurring Tasks” is now available under every resource’s Recurring Task screen (click on). The purpose of this screen is to allow the Resource to:

6.3.1. Easily Transfer ownership of tasks currently owned by them to other resources accessible to them.

6.3.2. View a list of all Recurring Tasks that have been assigned to them as the [Resource](#). This is useful for resources that may be going away on leave to view tasks that may kick off while they are away and then plan accordingly to do a proper handover for the duration of the period they will be away.

MANAGE RECURRING TASKS

Recurring Tasks Owned by Me

Recurring Task	Owner	Assigned To	Due	Duration
[RT] Check WorkPool Website	<input type="text" value="Pierre Norden (158)"/>	William Warwick	28/07/2011 09:01	15 min
[RT] Projector Maintenance - 6 Weekly Check	<input type="text" value="Pierre Norden (158)"/>	Pierre Norden	04/08/2011 09:00	0 min

Recurring Tasks Assigned to Me


Recurring Task	Owner	Assigned To	Due	Duration
[RT] Projector Maintenance - 6 Weekly Check	Pierre Norden	Pierre Norden	04/08/2011 09:00	0 min
[RT] Video Camera Maintenance - 3 Monthly Check	WorkPool Accounts	Pierre Norden	01/08/2009 17:00	30 min
[RT] Weekly Support Billing	WorkPool Accounts	Pierre Norden	17/07/2009 09:01	01 hrs
Change All Passwords on Servers	Marius Botha	Pierre Norden	17/07/2009 16:00	15 min

COMMUNICATIONS

1. Minor Changes and Bug Fixes

- 1.1. Bug Fix: When using the “Guess Tasks” function while viewing an email message that has not been imported yet (only applicable to IMAP protocol) the “Guess Task” results displayed details of tasks to resources that should not have had access to it, such as the title and task resource. However once the email was imported the featured continued to function correctly. This bug only occurred if the resource’s mailbox was configured to use IMAP without the Auto Import message option.
- 1.2. If “Time Taken” is marked as a required field (a property that can be changed), WorkPool now applies the same rules to the “Time Taken” field on the Send Mail Message screen.
- 1.3. Resources can no longer configure or change “Task Notification” options unless they have a valid email address specified. This is mostly applicable to old user accounts.
- 1.4. Bug Fix: The web server was attempting to process WorkPool Expressions in the body of an email message as Java expressions (tags). This caused problems and has now been suppressed.
- 1.5. Email addresses with leading or trailing spaces are now automatically corrected (trimmed) during address lookups to prevent duplicate email addresses being stored.
- 1.6. The act of linking an email message to an Entry folder and a task is now recorded in the Message Audit Trail.

2. Quick access to attach “Related Documents” to Emails

- 2.1. A new “More Documents”  icon has been added to the Send Mail Message screen next to the “Attach File” icon. When the user clicks on this button WorkPool will display a dropdown containing all documents it thinks may be related or useful to the specific email message. Documents considered in this way will include documents linked to the Task, URL Attributes on Views linked to the Directory Entry, linked 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. [This change will allow users to access and attach files directly from this screen without the need to “copy and paste” the link, or download and then re-upload the file to send it \(creating duplicates\).](#) See screenshot below as example.

Time Taken : minutes (Time Started : 11:08)

Attach File :

Activities

Important Scripts.txt 2010/10/26 11:05

Emails

Se7enth Sense Technologies Statement July 2008.pdf 2008/08/04 22:51

000791 Se7enth Sense Technologies.pdf 2008/08/04 22:51

000796 Se7enth Sense Technologies.pdf 2008/08/04 22:51

Calendar Events

wallpaper-612531.jpg 2010/10/26 11:07

items

TAXLEDGER.txt 2003/03/22 00:00

Documents on Process

DirectoryReport.txt 2010/10/26 10:59

JAD Notes.docx 2010/10/26 10:59

Documents on Views

WorkPool_Training_Processes.doc 2006/02/06 15:08

[Send Mail](#) [Save as Draft](#) [Back To Task](#)

3. Setting Next-Action from the Send Mail Message screen

3.1. The Next-Action dates of tasks linked to an email message can now be set on the Send Mail Message screen, assuming the author of the message is also the resource on the linked tasks. If the Next-Action date is in the past, the system will prompt the user to correct and update this value before sending the email.

-----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 (SE7ENTH SENSE TECH) - MAIL

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

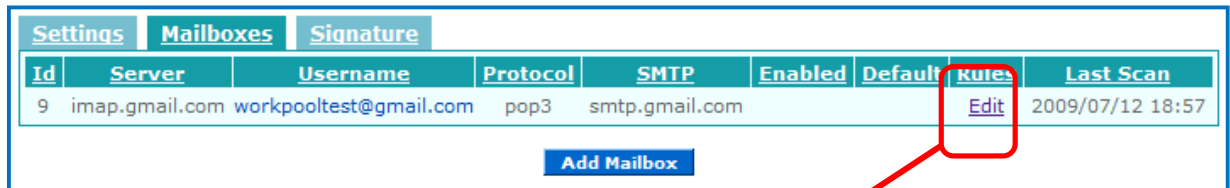
Task Next Action Dates to be changed :

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

4. New Email Rules Processor: Out-of-Office and Automatic Task Creation

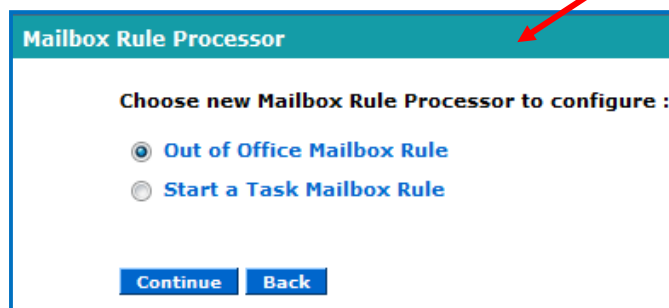
4.1. Two email rule processors have been added on the mailbox configuration screen. These rule processors will allow a user to configure either one of the following rules for their mailbox:

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



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

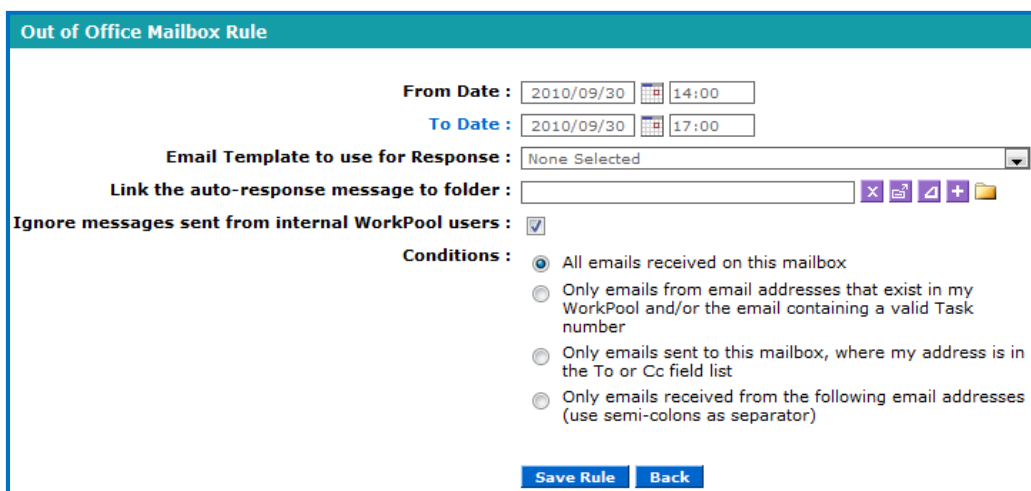
Choose new Mailbox Rule Processor to configure :

Out of Office Mailbox Rule

Start a Task Mailbox Rule

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

4.2. 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 :

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](#)

4.3. 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. This is a replacement of the “Task Mail Processors” feature that was previously located under the System Administration section under “Interaction Services”.

5. Time Taken on Email Activities

- 5.1. Should a system default not have been set by the Administrator the “Time Taken” field can be configured by each user as a required field. Users can configure this on the Custom Interface Settings screen under the User Profile section.

DIRECTORY

1. Minor Changes and Bug Fixes

- 1.1. JDBC Data Source History (Directory Administration): Users can no longer remove logs without selecting a value (caused an error).
- 1.2. The heading “Directory Audit Details” (Directory Admin) has changed to “Directory Statistics and Audit Details” with two new reports added to it namely “Entry Statistics” and “View Statistics”.
- 1.3. New Directory Properties (Directory Administration):
- 1.3.1. A new property was added to set the default date range for Emails displayed under the “Emails” tab in the Entry Folder.
- 1.3.2. A checkbox was added to enable users to view all entries in the directory at once. If this feature is enabled, an asterisk (*) will appear on the Directory screen.
- Please note:** Use this feature with caution as it may slow WorkPool down significantly in the case of a large Directory database.

DIRECTORY PROPERTIES

Enable Show All Entries :

Entry lookup dropdown limit : (Max = 75)

Task list day limit (period) :

Default period for Email Folder :

Configure External Client Folder Viewer :

External Client Folder Url :

Personal Entry Enabled :


Allow Duplicate Listed Names :

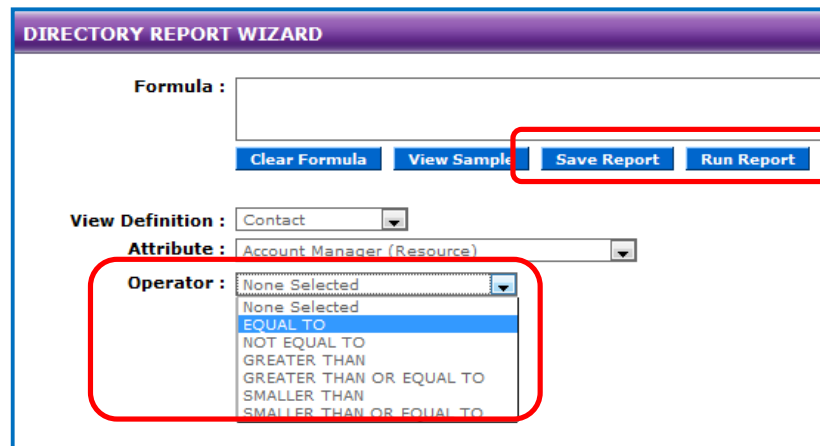
Save **Back**

2. New Directory System Reports (Directory Administration)

- 2.1. Entry Statistics: This report will display a summary of the amount of entries that exist as well as other informative information that can be used for maintenance purposes.
- 2.2. View Statistics: This report will display a summary of the amount of views that exists.

3. The Directory Report Wizard and Report Maintenance

- 3.1. Any user with Directory access can now build, execute and save Directory reports (restricted according to their permission groups) without the assistance of a Directory Administrator. These reports (created and owned by the individual) can be accessed and maintained without the need of administrator access by clicking on the following new icon  on the main Directory search screen (next to the Wizard icon). These reports will only be visible to the author, except for an administrator who will have access to all these reports and will also be able to publish them based on permission groups for other resources to use. The administrator will find these reports on the Report Management screen (Directory Administration).
- 3.2. Users can now also run their reports directly from the new Report Wizard screen **without saving them**. Other changes were to the Report Wizard screen to make it more user-friendly and descriptive, e.g. operators like “!=” is now “NOT EQUAL TO”; “>=” is now “GREATER THAN OR EQUAL TO”, etc.



The screenshot shows the 'DIRECTORY REPORT WIZARD' interface. It features a 'Formula' input field at the top. Below it are four buttons: 'Clear Formula', 'View Sample', 'Save Report', and 'Run Report'. The 'Save Report' and 'Run Report' buttons are highlighted with a red box. Below the buttons is a 'View Definition' dropdown menu set to 'Contact'. Underneath is an 'Attribute' dropdown menu set to 'Account Manager (Resource)'. At the bottom is an 'Operator' dropdown menu that is open, showing a list of operators: 'None Selected', 'EQUAL TO', 'NOT EQUAL TO', 'GREATER THAN', 'GREATER THAN OR EQUAL TO', 'SMALLER THAN', and 'SMALLER THAN OR EQUAL TO'. The 'Operator' dropdown menu is also highlighted with a red box.

4. New Dynamic Report Expressions

- 4.1. Reports can now be configured to use some system variables in expressions. E.g. the report can now compare a Resource attribute against the user that is currently logged in. Also, date attribute values can now be used to compare against, for example the date the report is being executed. This will allow resources to run reports based on current data instead of rewriting the report. The two new expressions looks as follows:
- `view(Contact).lineManager == ${currentUser}`
 - `view(Contact).renewalDate == '${system.date.now}'`
- 4.2. When using the Wizard to build an expression the “Current date” value will only appear when selecting the “entire object” option from the Qualifier dropdown menu. See example below.

DIRECTORY REPORT WIZARD

Formula :

View Definition :

Attribute :

Qualifier :

Operator :

Compare With :

Always use the current date

Where no value(empty/null)

PROCESS MANAGEMENT

1. Accessing of Attribute values in Processes

- 1.1. Accessing Attribute Values on Views, linked to the same Entry: The process engine now allows the process designer to access the values of [Attributes on Views linked to the same Entry Folder](#) as the task when processing Transition conditions. E.g. you can now check the “Gender” attribute on a “Person” View while the process is executing and make the process transition in a different direction. The expression syntax for using this would look as follows: $\${view(Person).gender} == 'Male'$. Another example using dates values would be $\${view(Contact).date1.year} > 2004$
- 1.2. Support for Process Attributes in Flow Title and Description fields: The process designer can now refer to attribute values on the process in the Flow Title and Description text, e.g. using an expression like $\${NewClientName}$ inside a task’s description.

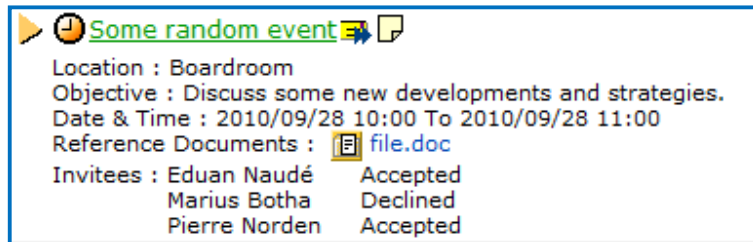
CALENDAR

1. Minor Changes and Bug Fixes

- 1.1. Bug Fix: Archived tasks are now displayed under Commitments for the Day.
- 1.2. Bug Fix: When the manager of a Calendar Event did not have a valid email address specified under his/her user profile it resulted in an error message when attendees declined an invitation and sending notifications out to an empty/incorrect email address.
- 1.3. Bug Fix: Using the Calendar screen in a different window/tab in the same browser does not affect other windows/tabs opened in the same browser any more.
- 1.4. Email notifications sent as a result of a resource declining the invitation is now automatically linked to the same task the calendar event is linked to (if applicable). Declined invitations are also recorded against the event’s Audit Trail.


2. Improved Calendar Event layout on Show Task (see Task History section)

2.1. The layout of a Calendar Event, displayed under the task it is linked to, has also been improved to show more information, like the location, objective, date & time, and all invitees, including their invitation statuses (see Task History section). Attachments on the event are also visible from here and will also be included as documents under the new improved Documents tab.



ITEMS

1. Minor Changes and Bug Fixes

- 1.1. Bug Fix: The Edit Item screen now retains attachments, like the Item Document and Item Picture, if a user error occurs and the screen is reloaded.
- 1.2. Improved Allocation/De-Allocation of Child (Composite) Items:
 - 1.2.1. An “Add Item” button  was added to the top of the View Item screen to allow for easily adding child items.
 - 1.2.2. Should an Item have child Items that are linked to the same entry and the user clicks on the button to delink the parent from this Entry, then a new, secondary popup box will ask the user whether the child item/s should be delinked as well. If confirmed the child Items will be updated as well.
 - 1.2.3. Child items are now visible and can be included or excluded during the allocation process of a parent item.

FILES

1. Minor Changes and Bug Fixes

- 1.1. The FILES search function now also returns Document Folders that match the search criteria (name only).