WORKPOOL RELEASE NOTES

| WorkPool Version | : | 4.4.3.021 | Internal Build Date | : | 2011/02/24 |
| Release/Batch Number | : | 69154 | Notes Prepared By | : | Eduan Naudé |

Summary of Modules / Components Affected:

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

CHANGE LOG DETAILS

WORKPOOL SYSTEM ADMINISTRATION

1. Minor Changes and Bug Fixes

1.1. **(70071):** The property for configuring the URL/link for the Intranet Home screen that was removed was added again to the System Administration section.

1.2. **(70003):** The error that appeared when someone is trying to login into WorkPool while the WorkPool License screen is open in a separate window/tab has been fixed.

1.3. **(70026):** Fixed the error when saving an existing resource's Notification and Communication Details under the new Administration screens.

1.4. **(70032):** The following general corrections and changes were made:

    a.) Existing Business Units can now be renamed if the maximum number of allowed business units has been reached.

    b.) An appropriate error message is now displayed when clicking on the "Add" button to add an additional Business Unit when the limit has been reached.

    c.) Corrected the bug where the System File Upload Properties did not always save/refresh the settings the first time.

    d.) Updated the Resource Responsibilities Confirmation screen (deactivating/migrating a resource) to fix incorrect totals.

TASKS AND ACTIVITIES

1. **Add details of new Tasks Created to Recurring Task Audit Trail (70012)**

   When a Recurring Task creates a new Task, as per its schedule, the Task information (e.g. Author, Date Modified, Description, etc.) is now recorded in the Recurring Task's audit trail. This will allow users the ability to see and track when a Recurring Task kicked off and what the details were at that point.

2. **Minor Changes and Bug Fixes**

   1.1 **(70009):** The Tasks Error Message screen and the Task Tracker screen have been updated with the current color and layout theme.
   1.2 **(70017):** The Task Search and Advanced Task Search features have been updated to exclude deleted tasks as part of the returned results.
   1.3 **(70028):** The Manage Resources list will now automatically be refreshed after archiving tasks.
   1.4 **(70034):** Fixed the error that appeared on the Task Scheduler (Bulk) screen (see Task Administration section).
   1.5 **(70719):** Fixed the bug where Recurring Tasks were retaining the previous owner when transferring Recurring Task ownership using the new "Manage Recurring Tasks" feature.
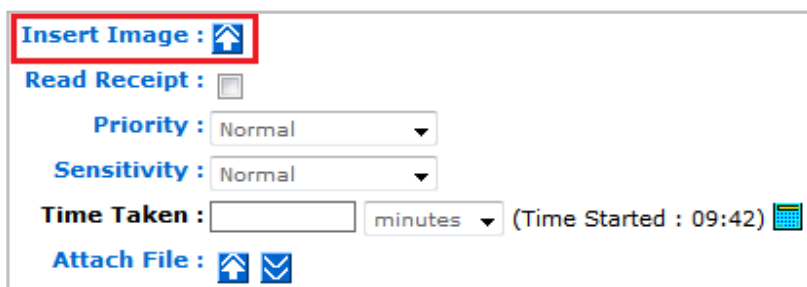
COMMUNICATIONS (EMAIL & SMS/TEXT MESSAGE)

1. **Included a new feature to allow users to insert/embed images into the body an HTML formatted Email Message**
   The Insert Image function is located below the message body box as per picture below. Browse and upload the file as per the normal control for uploading documents.

2. New Indicator Message for Mailboxes experiencing difficulties downloading emails

Due to other 3rd party vendors, clients or email spammers not adhering to the generally acceptable industry standards and email policies some clients have reported that these emails cannot be imported into WorkPool ("broken" email messages). Most often this is spam, however the implication for clients using a dialup service or with limited bandwidth is that WorkPool will continue to try and download these emails. If these emails contain attachments (such as pictures) the result could be a slow drain on the bandwidth used. To prevent this a new warning mechanism has been implemented to better detect and manage these "broken" email messages that are unable to download successfully into WorkPool. WorkPool will now manage this situation as follows:

a.) Display a warning message for the specific mailbox experiencing the problems after 5 failed attempts.

b.) If the problem cannot be resolved, the mailbox will automatically be disabled to prevent further bandwidth usage, unless the resource has Mailbox Rule Processors configured under their specific mailbox. This will take preference as it could mean that this mailbox is not being monitored by a person.

c.) The resource (whose mailbox it is) will receive an automatic notification detailing the problematic email and can then take the necessary steps to retrieve the message using alternative methods, e.g. removing or forwarding the email message using a different mail client.
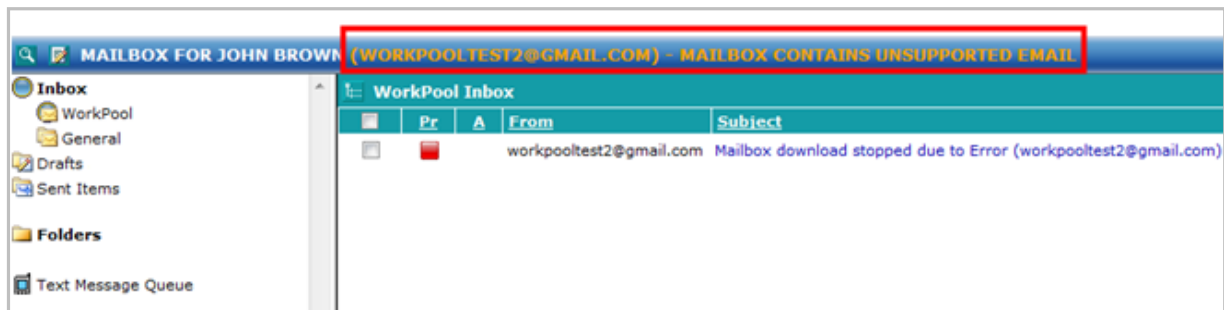
3. Minor Changes and Bug Fixes

3.1 **(70014):** Personal email folder tree can now be fully expanded and collapsed.

3.2 **(70018):** Corrected the sender/receiver bug as occurred on the first message (only) when sent as part of a bulk email action form within a task. This caused the message to be saved as a draft.

3.3 **(70020):** The Mobile Numbers of Directory Entries with Listed Names containing apostrophe's now visible on the SMS/Text Message screen when using the "Choose another Number From" feature.

3.4 **(70021):** Renamed label on the "Confirm Receivers" screen where an external resource's email address was being displayed as an internal resource.

3.5 **(70022/70035):** Changed error messages to handle missing/deleted messages on an IMAP mail server that was still visible in WorkPool.

3.6 **(70036):** Added support for the "Unknown encoding: ISO-8859-1" content type (SPAM) to download these messages and then delete them in WorkPool (user).

3.7 **(70731):** Trailing "blank space" characters are not filtered out from (old) email addresses stored in the system, therefore will suppress duplicate email addresses during email lookup when composing an email message.

DIRECTORY

1. **Minor Changes and Bug Fixes**

1.1 **(70025):** Moving, deleting or setting email addresses and mobile numbers as default receivers under the "Entry Communications" screen are now recorded in the audit trail of the Entry.

1.2 **(70006):** A list of all email messages can now be viewed in an Entry Folder by removing the "From" date from the filter control (defaults with a date value).

1.3 **(70019/70456):** Fixed the missing link error when opening the Recurring Tasks screen for an Entry Folder from the "Entry Properties" menu.

1.4 **(70031):** New additional characters are now supported on the Directory Report screen, e.g. using empty quotations (""). The formula expression no longer returns an error or causes other functions to stop working (JavaScript error).

1.5 **(70261):** Added support for "<" and ">" characters in the Task titles. This was causing an error in Internet Explorer as reported on the Directory Report Wizard screen (page did not render correctly).

PROCESS MANAGEMENT

1. **Minor Changes and Bug Fixes**

1.1 **(70010):** Minor changes to the Process Definition record is now allowed on the "Edit Process Definition" screen while the Process Definition is marked as active (previously not allowed).

1.2 **(70007):** The Task Tracker icon has been added to the task action panel on the Process Instance screen (purple bar at the top).

1.3 **(70033):** Significant Bug - Fixed the transition logic for Processes with Forks and Joins that resulted in duplicate tasks being created. This only occurred when the process reaches a transition that kicks off two or more tasks, where one of the tasks has a direct flow

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(transition) into the joining task but the other task must first go through a separate sequence of tasks before reaching the same point in the process. See the following diagram as example. Completing task "C" was causing task "E" to be created before task "B" or "D" was completed.
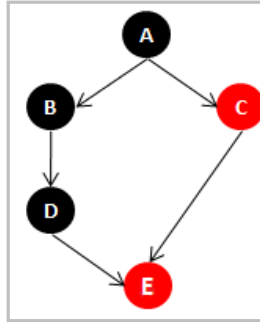
CALENDAR

1. Calendar Event Search (70002)

A new advanced search feature has been added to the Calendar screen. This function can be accessed via a new search 🔍 icon located in the top left-hand corner of the "My Calendar" screen. This function will allow users to find information pertaining Calendar events based on parameters/filters they specify.
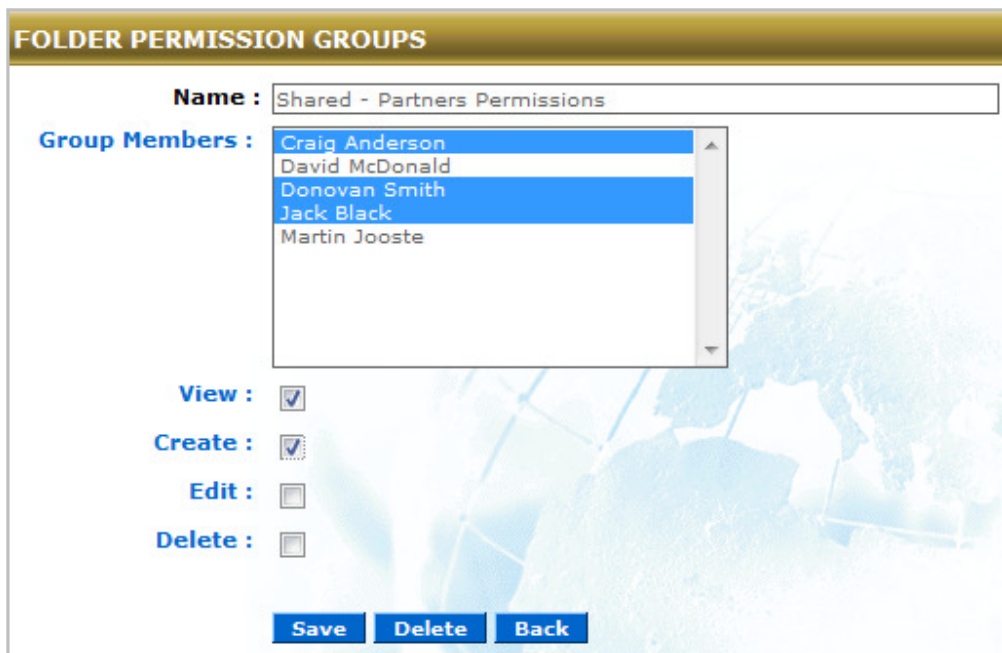
2. Minor Changes and Bug Fixes

2.1. **(70004):** The Next Action date on a task linked to a Calendar event is now updated if the "Set task next action date to event date" is selected upon creating a new calendar event. This was not happening before.

FILES (DOCUMENT REPOSITORY)

1. Files section updated to support permission based access (70005)

The Files section has been improved to allow for more advanced permission based configuration, similar to Directory Permission Groups. Permission Groups can be defined for each Root Folder (a library or repository of information) and these permissions will cascade down the folder's hierarchy and be applied to all sub-folders and files. In addition each sub-folder can now be changed to allow for different/specific permission groups.

Most blue action buttons have now been removed from folders and replaced with icons (in top-left corner of a folder screen). Icons now appear or disappear as part of the context sensitive action panel, where these rules are based on the permissions of the user viewing the folder (e.g. admin, read/ create/edit/delete permissions). The panel icons are as follows:

Root Folder Icons

   View Folder Details

Add Folder

Add Document

Change Folder Permissions

Sub-Folder Icons

Edit Folder

View Folder Details

Folder Audit Trail

Document Icons

Edit Document

Add New Version

Check Out Document

Check In Document

Cancel Check Out

The FILES section's landing page now defaults to the search function. This screen is also accessible via the search icon located in the top left-hand corner. The landing page also lists the last 15 or so changes made to documents accessible to the user. This is useful for staying informed on changes to documents and allows the user the opportunity to go and review these changes.

In the past, Document records with no attachments (no version attached) would have no icon next to it to indicate that there is no document. This has been changed to show the following icon instead (grayed out).

WorkPool now has a feature where documents can be "checked Out" by a person and therefore indicate to others they are busy working on this and so prevent other people from updating or adding the same document. E.g. in the case where another person is not aware you are already working on a document and downloads a copy to work on it, it could result in their copy of the document being out of sync with yours or when both people check in their new version of the document the other persons changes can get lost (not merged). The "Check Out Document" icon will open a new screen where the user can add any additional notes or reasons why the document is being checked out. The document can then either be checked in (new version) or the check out process can be cancelled (no changes made). Checking In the document will open the "Add New Version" screen and cancelling the check out will open the "Cancel Document Check Out" screen where a reason can be given why the check out is being cancelled.

A new feature has also been added to the FILES system administration side to allow a system administrator to view all the audit notes (changes) made in a certain period. This is useful to track changes and activity over a period of time. See example below:

2. Minor Changes and Bug Fixes

2.1 (70037): Due to caching, new Documents were not reflecting under the "Find Document in Repository" option on the File Link/Upload window unless the user logged out. This has now been changed so documents reflect immediately after a version of that document has been added.

2.2 (70038): Changes made to the formatting and layout of the Document Versions table on a Document.

ITEMS

1. Minor Changes and Bug Fixes

1.1 (70027): Fixed the error that occurred during Item allocation when a user supplied incorrect information or information was missing, e.g. not selecting an Entry (required field) or when the allocation date was in the past.