

WORKPOOL RELEASE NOTES

WorkPool Version : 4.4.4
Release/Batch Number : 72141

Internal Build Date : 2011/10/04 (003)
Notes Prepared By : Marius Botha

Summary of Modules / Components Affected:

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

CHANGE LOG DETAILS

CALENDAR

1. Minor Changes and Bug Fixes

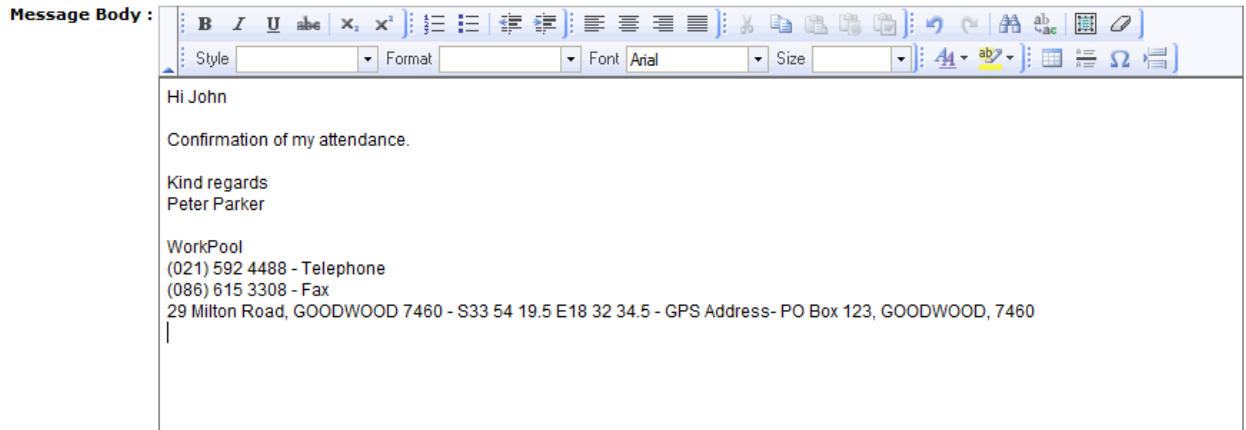
- a. (73060) Fixed bug: Users could not decline Calendar Events where parties were invited who had no Email Address configured for their account.

COMMUNICATIONS (EMAIL & SMS/TEXT MESSAGE)

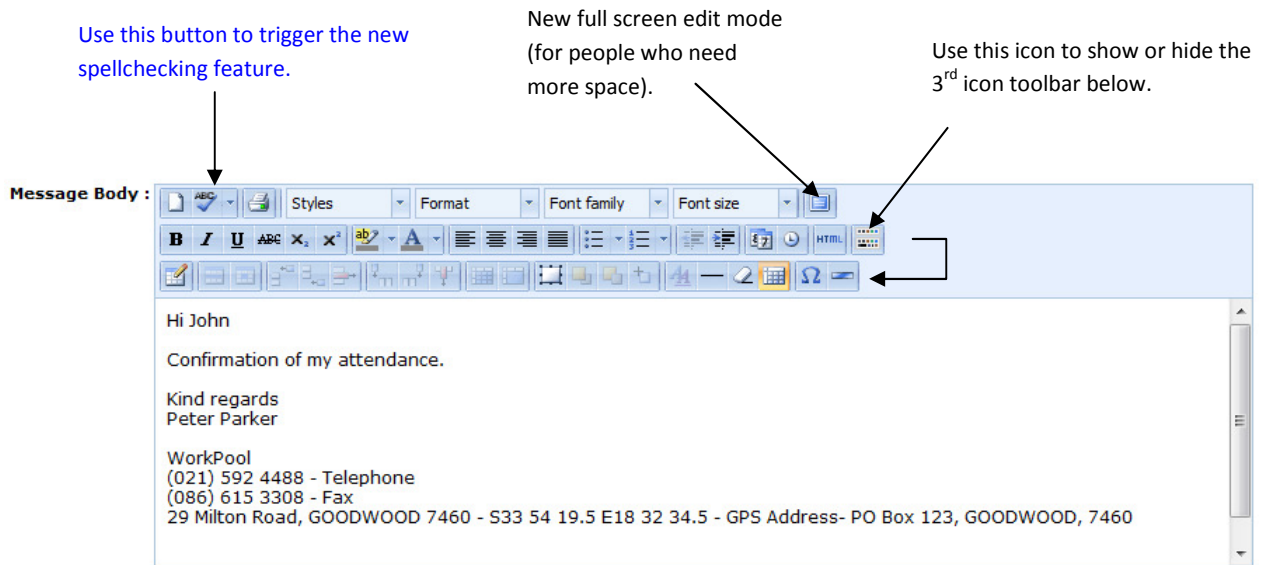
1. New Email Editor (HTML & Plain Text) messages with support for Spell Checking (72603)

The previous email editor component has been replaced with a more modern component to allow for more features and to be in line with some other popular web based email systems.

Screenshot of Previous Editor for HTML Emails:



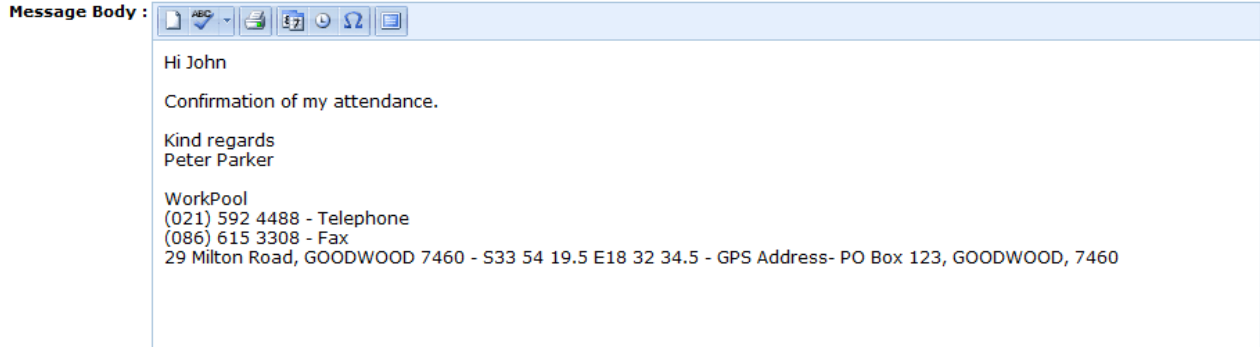
Screenshot of New Editor for HTML Emails:



As per example above several new icons and features have been incorporated, including a spellchecking feature. Spellchecking can also be configured to trigger automatically before the user clicks on the “Send Mail” button by enabling this feature under the “System Email Settings”.

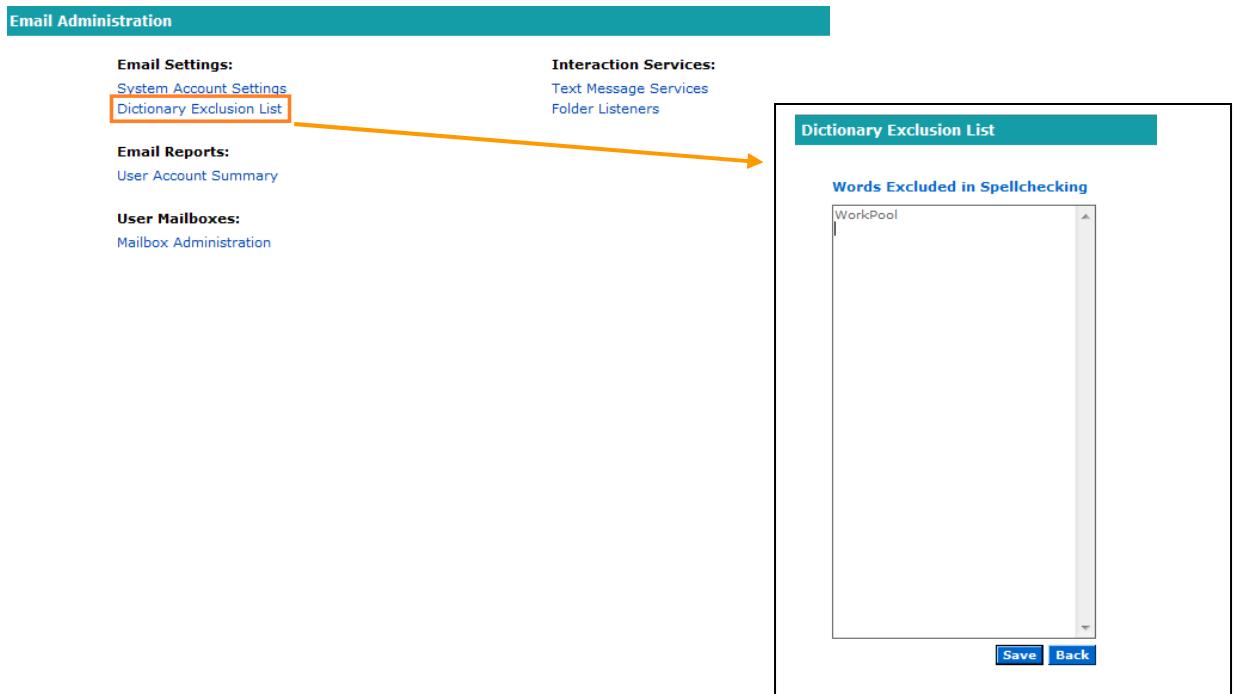
Screenshot of New Editor for Plain Text Emails:

The editors for Plain Text emails has also been updated (previously just a white box) to allow for more features such as inserting symbols, full screen edit and of course spellchecking (as above).



2. Support for Common/Company Dictionary (73284)

To allow companies to add their own company or user names (e.g. as may appear in their email signatures) into the system dictionary to exclude these as spellchecking errors a new area has been created where an email administrator can configure this. It is however intended that over time users will, in addition to this feature, have their own exclusion list and alternate dictionary options for other languages. The “Dictionary Exclusion List” can be found on the following location and new words added on new lines:



3. Configure Personal Signatures from Company Templates (72605)

For the sake of consistency and to expedite and simplify the configuration of user signatures an administrator can now configure an Email Template for this purpose. Users can now select from the list of templates the template they want and WorkPool will populate the signature with this content. Furthermore these templates support WorkPool expressions such as the ones below to so that the system can auto-populate the user's information in the template if this is configured and applicable. For example:

`\${currentUser.name}`
`\${currentUser.surname}`
`\${currentUser.displayName}`
`\${currentUser.initials}`
`\${currentUser.jobTitle}`
`\${currentUser.phoneNumber}`
`\${currentUser.emailAddress}`
`\${currentUser.mobileNumber}`

Choose from list of email templates

Settings Mailboxes Signature

Content Type: Plain Text

Copy Content from Template: None Selected

Signature Content:

Kind regards
Peter Parker
Operations Manager

WorkPool
(021) 592 4488 - Telephone
(086) 615 3308 - Fax
29 Milton Road, GOODWOOD 7460 - S33 54 19.5 E18 32 34.5 - GPS Address- PO Box 123,
GOODWOOD, 7460

Active:

Save

This feature was inserted because of the difficulty non-technical users were reporting with configuring HTML signatures for themselves. Browser-based email clients do not follow the same rules as standalone email client applications (like Outlook) and therefore depends on the actions of the user to ensure they configure such a signature properly to ensure it will work in their own browser and also is sent and so received and displayed properly by the receiving party's email client.

4. Fix/Support for MS Exchange Service Pack Updates for 2007 (E12SP3RU3) & 2010 (E14SP1RU4) causing HTML Email Content to be stripped out and added as attachment (73351)

In the respective version updates mentioned above Microsoft has reportedly changed the way they "put together" email messages with mixed content (e.g. HTML + pictures) and as a result many non-Microsoft email systems have been affected and are reporting problems. Apart from Java based applications (like WorkPool) they have also reported the same from Apple Mail clients (iPad/iPod), etc. This is the likely cause to explain why some clients have reported problems where their mixed content emails are sometimes received in separate parts by clients. Changes have been made to accommodate this, albeit caused not by WorkPool but rather a deviation from the manner in which Microsoft's products choose to interpret and manage email content.

5. Minor Changes and Bug Fixes

- a. **(72878)** Email Message Content and Notebook Content storage size increased from 65,535 bytes (64kb) to 16,777,215 bytes (16MB).
- b. **(72617)** Fixed bug where email addresses with less than 3 characters before the @ sign (e.g. cv@workpool.co.za) was classified as invalid.
- c. **(72899)** Additional warning messages added to system for users using the IMAP protocol to ensure sufficient protection from making a mistake on configuring mailboxes with this protocol.
- d. **(72957)** Email Template selection box's width now auto increases depending on content.
- e. **(72981)** Fixed bug: Email Search function was not filtering on the Entry Folder selected.
- f. **(73134)** Fixed Bug: Replying on emails with message children (message attachments) auto attached these messages when replying to an email (was not correct and also not visible to the user).
- g. **(73209)** Fixed bug: Message attachments (i.e. messages attached to messages) would sometimes appear in the user's inbox after the parent message was removed and could then not be filed away as it has no folder of its own.
- h. **(73295)** Fixed Bug: Entry Folder not visible on "Out of Office Mailbox Rule" page in Firefox.
- i. **(73621)** Fixed Bug: Mailbox Rule Processor screen did not allow for updates/changes.
- j. **(73436)** Change: Changed SMS connectivity information to SMS Portal Service provider based on changes to their infrastructure. Only affects users of this service.

DIRECTORY

1. New Feature to allow for Bulk Import of Attachments/Files from File System (72606)

This feature, located under Directory Administration, will allow system administrators to import batches of files into WorkPool as Tasks, Activities, Documents (under files), etc. in various combinations. This feature is extremely useful for taking on new clients with large amounts of files to import, or for clients who want to convert an existing (external) repository of information such as HR policies or from a shared network drive into WorkPool.

DIRECTORY ADMINISTRATION

Directory Configuration:
[Maintain Directory Properties](#)
[Maintain View Definitions](#)
[Maintain Permission Groups](#)

Directory Statistics and Audit Details:
[View Audit Entries Per Period](#)
[Entry Statistics](#)
[View Statistics](#)

Data Transfer:
[Manage File Data Sources](#)
[Manage JDBC Data Sources](#)
Batch File Import

Communication Templates:
[Text Message Templates](#)
[Email Templates](#)

Report Management:
[Reports](#)

BATCH FILE IMPORT - SPECIFY FOLDERS

Source Folder on Server :

Action to Perform : Retain Files After Import
 Delete Files After Import
 Move Files After Import

Move Files to Folder :

Choose from a list of options the action you wish to perform with these files. These are:

- Action to Perform :**
- Create a new Task/Process for each file imported
 - Create one new Task and add all files as individual Activities
 - Create individual/standalone Activities for each of the files imported
 - Import all files into a Document Folder in File Repository

Based on your selection above you will be asked to provide some additional information and then make a selection from the files found to process in this manner:


Files Found in Source Location : 17

<input type="checkbox"/>	File Name	Date Modified	Size
<input checked="" type="checkbox"/>	WORKPOOL A NEW APPROACH ON GETTING PEOPLE TO WORK.doc	2003/07/12 14:38	19 KB
<input checked="" type="checkbox"/>	WORKPOOL ACTION PLAN 2.doc	2003/06/08 17:54	33 KB
<input checked="" type="checkbox"/>	WORKPOOL ACTION PLAN.doc	2003/06/02 12:25	19 KB
<input type="checkbox"/>	WORKPOOL BUSINESS NERVOUS SYSTEM.doc	2003/06/04 21:52	30 KB
<input type="checkbox"/>	WORKPOOL BUSINESS PARTNER PROGRAMME.doc	2003/06/08 10:58	67 KB
<input type="checkbox"/>	WORKPOOL CHANNEL PARTNER DEFINITIONS.doc	2003/06/13 20:37	22 KB
<input checked="" type="checkbox"/>	WORKPOOL CHARLIE ENABLEMENT PROPOSAL ver2.1.doc	2003/05/28 09:07	99 KB
<input checked="" type="checkbox"/>	WORKPOOL CHARLIE ENABLEMENT PROPOSAL ver2.doc	2003/05/28 06:38	72 KB
<input checked="" type="checkbox"/>	WORKPOOL COLLECTIVE PARTNER PROGRAMME.doc	2003/07/03 15:40	19 KB
<input checked="" type="checkbox"/>	WORKPOOL COMPANY PROFILE 2.doc	2003/08/07 08:00	21 KB
<input checked="" type="checkbox"/>	WORKPOOL COMPANY PROFILE.doc	2003/07/03 10:42	21 KB
<input checked="" type="checkbox"/>	WORKPOOL IMPLEMENTATION ISSUES.doc	2003/06/08 19:11	19 KB
<input type="checkbox"/>	WORKPOOL IMPLEMENTATION PROPOSAL.doc	2003/09/15 15:22	19 KB
<input checked="" type="checkbox"/>	WORKPOOL MARKETING PLAN.doc	2003/06/02 06:59	19 KB
<input type="checkbox"/>	WORKPOOL MARKETING PROCESSES.doc	2003/06/13 17:24	19 KB
<input checked="" type="checkbox"/>	WORKPOOL PARTNER PROGRAMME DOCUMENTATION REQUIREMENTS.doc	2003/06/21 14:26	22 KB
<input checked="" type="checkbox"/>	WORKPOOL PARTNER PROGRAMME FEATURES AND BENEFITS.doc	2003/07/10 08:35	147 KB

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2. Apply “Business Unit” Level Access to Entry & View Screens and Report Wizard Access (72607)

The System Administrator can now enable new properties under the “Maintain Directory Properties” section to:

- 2.1 Prevent users who do not have access to a Business Unit that an Entry is published to from seeing the details of that Entry and any Views attached to it. Previously Business Units only prevented access to the Entry Folder and access to the Views were driven by the Permissions Groups for View Definitions. This can now be used to limit access to the contact details view of Staff members for example if the Staff member’s entry is linked to the “HR” business unit and other users do not have access to this unit. Please note that Directory Reports can be created to override this access (for example to view and export “View” information) where necessary since this can be controlled with Permission Groups already.
- 2.2 Prevent users from building their own unauthorized reports by blocking access to the Report Wizard feature (). The administrator can now disable access to this function for all non-administrator users.

3. Minor Changes and Bug Fixes

- 3.1 (72678) Fixed Bug where some users were allowed to ADD Views when they had VIEW Access to them only.
- 3.2 (73013) Fixed Bug on Directory Report Screen to sort Permission Groups alphabetically
- 3.3 (73244) Fixed Bug on Activity Tab in Entry Folder where Calendar Events were not sorting properly on some columns as part of the other Activities listed on the screen.

- 3.4 (73777)** Change: Adding support for additional Entry expressions to run in Report Builder (Wizard). These include: entry.refNo, entry.createdOn, entry.modifiedOn. New rule also added to prevent access to secure View Definitions based on a user's permissions (73741).

FILES

1. Addition of "History" Permission

- 1.1** Purpose of this new permission is to introduce an additional layer of control (access) to the standard WorkPool Files module that will allow the administrator to manage access to a document's history information, i.e. the audit notes and previous versions. If the user does not have "History" permission, WorkPool will prevent them from opening the document's details page and will restrict them to access only the last version as published against this document. Existing permissions as may be configured on a WorkPool before upgrading to this version will automatically migrate permissions and assign the new "History" permission to users who currently have "View" permissions.

2. Minor Changes and Bug Fixes

- 2.1 (72882)** Fixed bug: Adding a New Document Record and uploading the first Version at same time was not adding the Document Version.
- 2.2 (73010)** Fixed bug: "Last Documents Modified" was not including recent changes to existing documents.

GENERAL

1. Minor Changes and Bug Fixes

- 1.1 (72616)** Improved "Tooltip" support in the main Menu Bar for tips that were displaying in Internet Explorer but not in Firefox.

ITEMS

1. Minor Changes and Bug Fixes

- 1.1 (73007)** Fixed bug: Item View screen was not updating immediately after archiving an Item.

- 1.2 (73151) Change: Decimal amounts saved to Audit Notes now using this default System Format settings to prevent trailing zeroes from being stored.
- 1.3 (73320) Fixed bug: Item Category screens were not sorting correctly on all columns.
- 1.4 (73779) Fixed bug: Item pictures were not displaying in all browsers under certain conditions.

NOTEBOOK

1. Minor Changes and Bug Fixes

- 1.1 (72610) Improved Browser Support for loading and displaying the spelling suggestion popup that was positioning incorrectly on the screen.

TASKS AND ACTIVITIES

1. Minor Changes and Bug Fixes

- 1.1 (72608) Change: Using the "Add to Today's Tasks" checkbox when adding an Activity on a Task will use the time value entered by the user (if different) and not current time.
- 1.2 (72609) Change: Notification Emails with Attachments removed from Documents Panel as the document will be displayed as part of the list of "Task" documents.
- 1.3 (72611) Change: Task Change Notifications for changes to a Task is now sent to the original Resource and not the new resource (who will get a New Task Notification anyway if his profile is configured for this) should the Owner make a change to the task at the same time as reassigning it to a new Resource.
- 1.4 (72612) Fixed bug: Task Edit Screen did not record changes to Next Action Date and Due Date under certain conditions. Now records all changes.
- 1.5 (72618) Fixed bug: Inaccessible Private Tasks were being added to the total of the Task Classification Report by default.
- 1.6 (72623) Fixed bug: Changes to "Task Predecessor/Parent" Field was not recorded as a Task Note under certain conditions.
- 1.7 (72785) Change: Changes to Decimal & Integer attributes will not be recorded using the default System Format Settings for this type of Attribute to prevent trailing zeros.
- 1.8 (72887) Change: Task Action Panel updated for tasks assigned to Resource Groups to allow for completing/signoff of these tasks by members of these Resource Groups.
- 1.9 (73210) Fixed bug: Inserting the [TASK:XXXX] Tag in the Task Title was overriding the link's default behavior and going to the task number in the title instead (only in some places).

1.10 (73804) Change: Removed warning popup message when completing a process bound task after sending an email. This is only applicable if it is an old process task that was reactivated (no longer bound by rules of process).