

## WORKPOOL RELEASE NOTES

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WorkPool Version : 4.4.5  
Release/Batch Number : 73145

Internal Build Date : 2012/07/27  
Notes Prepared By : Marius Botha

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### Summary of Modules / Components Affected:

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

\* Excludes prototyping of Task Lists

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## CHANGE LOG DETAILS

### CALENDAR

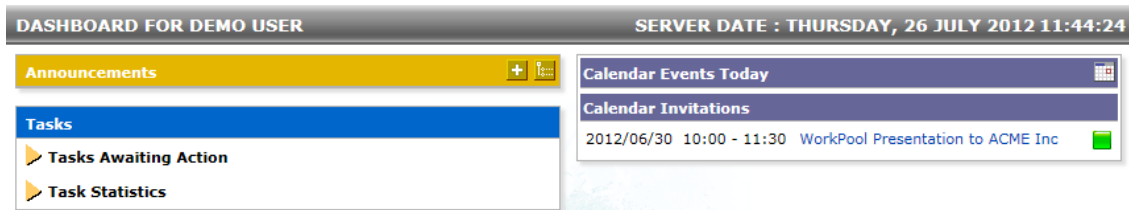
#### 1. Minor Changes and Bug Fixes

- a. **(79053 & 79058)** Fixed bug: In some cases attachments linked to an Event were removed from the FTP server when editing the event and/or a blank audit note was attached to the event (no content). Changes made to the Priority and Sensitivity values now use proper case for reporting the change.
- b. **(79310)** Change: The Calendar Search function was updated to perform in a manner that is more consistent with general searching, specifically relating to searching for events on keyword/s vs. phrases. The exact match will now search for the phrase or keyword anywhere in the title and not just for an exact match with the entire title. E.g. searching for "Meeting with Peter" will now also return events like "Urgent Meeting with Peter in Cape Town".

## COMMUNICATIONS (ANNOUNCEMENTS, EMAIL & SMS/TEXT MESSAGE)

### 1. Announcements / Dashboard Section Updated (76267)

The “Intranet Home” page (also known as the dashboard) was updated with some minor changes to the look and feel.



The Announcements module was also updated and the following changes implemented:

- The “Broadcast All” option was removed as it did not guarantee or allow for delivery to any specific users or groups of users. The same can be achieved by publishing announcements to the Business Units or Resource Group, so this option was removed. In addition the administrator can now enforce control over which users may publish announcements to which business units and groups, whereas any user could publish to everyone in the past, which was not ideal. If a user belongs to only one business unit, this unit will now be selected by default.
- Individual announcements can now be marked as read directly from the announcement panel itself on the dashboard. It is no longer necessary to select it and then use the dropdown to remove it.
- Announcements now also support the adding of images, where these images will be displayed as part of the announcement content.
- Announcements can now be published from Tasks, using the Activity action panel.

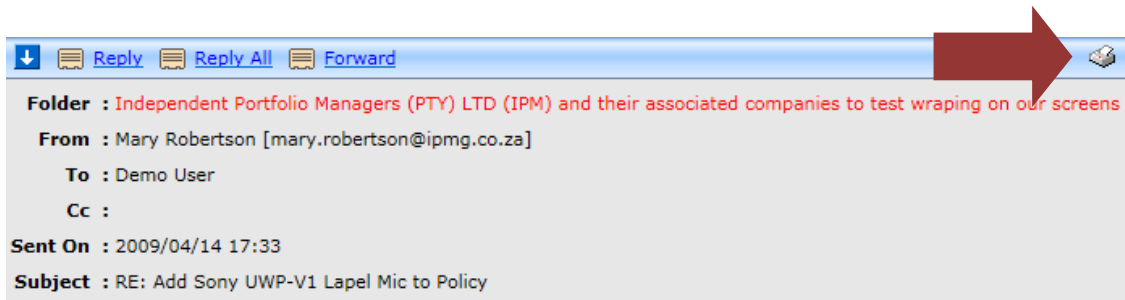
The screenshot shows a form for creating an announcement. It has a light green background. The form fields include: 'Description/Notes' with a large text area; 'Reference Doc/URL' with a small icon; 'Line Item / Summary' with a text field; 'Type' with a dropdown menu set to 'Administration' and a 'Billable' checkbox; 'Time Taken' with a text field, a 'minutes' dropdown, and a calendar icon; 'Time Started' with a text field set to '11:47' and a calendar icon; and 'Keep Activity Open' with a checkbox. On the right side of the form, there is a vertical toolbar with several icons. A large red arrow points from the 'Reference Doc/URL' field towards the toolbar, specifically highlighting the image icon.

This means that you can now record on the task history when you take action to publish an announcement.

- e. On an architectural level the “Announcement” object was split from the “Message” object, therefore the database was changed. This is part of a bigger overall change on messaging in WorkPool to separate different message types into their own modules for easier and more effective management and manage delivery and receipts.

## 2. New “printer friendly” page for printing of Plain and HTML Emails (76541)

While printing of emails are on the decline in most businesses some people still prefer to have a paper copy for their records or for discussion purposes. A new page was created specifically for printing of individual emails with support for both plain text and HTML content.

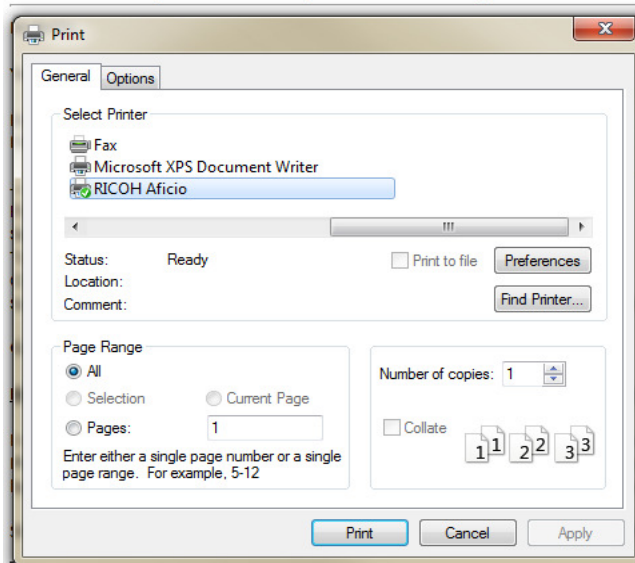


Printing and displaying HTML content will however always be a challenge due to the email content being rendered differently depending on the browser used. However this page should now provide a more consistent and appealing result in printing of emails.

Folder :  
From : Mary Robertson [mary.robertson@ipmg.co.za]  
To : Demo User  
Cc :  
Sent On : 2009/04/14 17:33



### RE: Add Sony UWP-V1 Lapel Mic to Policy



Kind Regards

Technologies

#### ENSE TECHNOLOGIES

quotation for the Sony UWP-V1 Lapel Wireless Mic. Kindly advise accordingly with further instructions accordingly.

gladly assist.

The browser will now also automatically pop up the printer dialog box once the email has completed loading.

### **3. Improved support for composing of emails on Tablet devices (77428 / 79163 / 79436)**

- a) With the latest BYOD (“bring your own device”) trend, tablets and smart phone have become a popular alternative, or complementary device, to gain access to WorkPool. Major changes were made to WorkPool to offer better support for several new components and screens. This includes improvements to allow Safari on Apple iPads to compose (reply/forward/create new) email messages and also display embedded pictures and opening of attachments. We have also made some minor changes to better support downloading of certain emails sent from iPad devices into WorkPool where these emails do not comply with recognized industry specifications.
- b) In addition, emails with attachments sent from BlackBerry devices (where the filenames of the attachments were encoded) will now be decoded by WorkPool before downloading it into the system to make it easier to read and manage.
- c) The HTML (rich text) editor that we use for composing HTML emails was replaced with an updated version of the same component (about 9 versions later). Changes include a variety of bug fixes and better support across multiple browsers. These changes should also address the issues that some FireFox users were experiencing where “weird” tags appeared in their emails. This same component was also used by the “My Notebook” function and was therefore also replaced with the new component. **(77730 & 78556)**

### **4. Minor Changes and Bug Fixes**

- a. **(74443/74904)** Fixed Bug: The Email Message Counter in the WorkPool Inbox indicating the number of New/Unread messages would under certain conditions show that there are still unread messages, but the mailbox would be empty. This was because WorkPool was adding links to child (embedded) messages in certain cases when it was downloading emails that already existed in the WorkPool database (i.e. same message ID).
- b. **(77430)** Fixed Bug: The Email Search function was returning unexpected results; these were the result of an “OR” search being done for individual keywords instead of an “AND” combination search.
- c. **(77435)** Fixed Bug: The “More Documents” icon that is used to display and then attach related documents to an email (on the email composing screen) disappeared when a user was making use of an email template.
- d. **(77498)** Fixed Bug: WorkPool automatically reattached child (embedded) messages when a user replied to an email that was received with child messages. I.e. if someone sent you an email that contained other email messages as attachments, these emails were automatically reattached as attachments to the new WorkPool email you were sending.

- e. **(77958)** Change: WorkPool allowed for a maximum of 255 characters for an email subject. In some cases this subject length was exceeded and as a result WorkPool could not save the email in the database. A change was made to the code to cut off any characters over the 255 character limit in the subject line so that WorkPool can still import the email rather than leave it unattended in the user's mailbox (i.e. not downloading).
- f. **(79197)** Change: In an effort to speed up the access to emails under the Email tab in an Entry Folder minor changes were made to the queries used to access these email messages and as a result, this should speed up navigation on these screens.
- g. **(79805)** Additional Support for Calendar Invitation Content: Due to changes in the way Outlook/MS Exchange and other email clients structure and encode Calendar Invitations in the body of their messages, the content imported in WorkPool would sometimes be inconsistent. WorkPool was updated to split the industry specific "Calendar Invitation" part from the email content in cases where it could be identified and show the human friendly version instead.

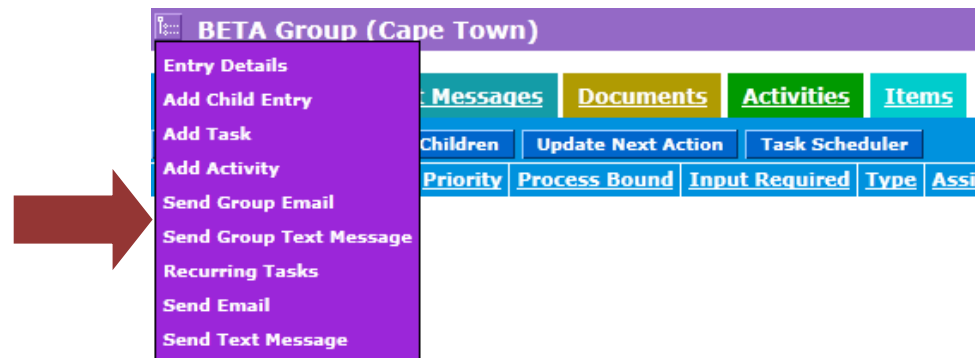
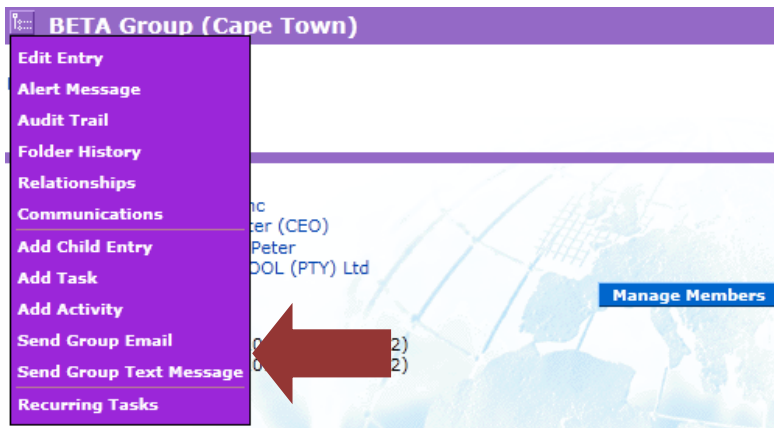
## DIRECTORY

### 1. Sending Emails or Text Message (SMS) Communications to Entry Groups (77766)

This new feature provides the user with the ability to send an email or an SMS to all of the members of an Entry Group, where the Entries in the group have a View which contains an email address or mobile phone number attribute/s on them.



These new functions have been added as options to the Entry Properties and the Entry Actions Dropdown menu on an Entry Group.



This new feature is similar to the bulk email and text message function that can be performed by means of a Directory Report, WorkPool will present the user with a list of all the email addresses and mobile numbers found on Views linked to Entries in the group and the user can then make a decision on how they want to act on this information. Duplicate addresses and numbers will be detected and removed to ensure the same communication is not sent out to the same person more than once. The following options are available when sending out an email communication:

- ☒ Send personalised (individual) email to each address
- ☐ Create new email and copy all addresses into the TO field
- ☐ Create new email and copy all addresses into the CC field
- ☐ Create new email and copy all addresses into the BCC field

[Next](#)

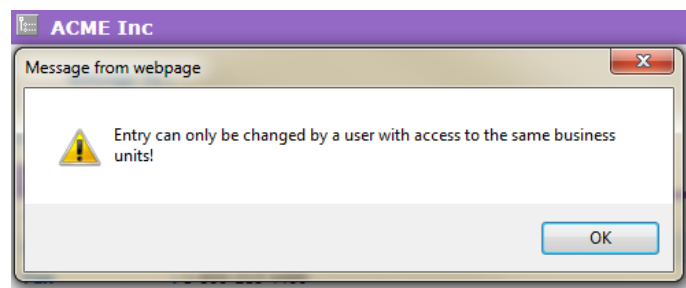
These can be explained as follows:

- a. Send personalized (individual) email to each address: Selecting this option will create an individual email for each email address. Emails will be linked to the Entry Folder for that address and Message Templates can be used to personalize the email so it does not look like a "bulk email".
- b. Create new email and copy all addresses into the TO / CC / BCC field: Depending on your selection, WorkPool will copy and paste the email addresses in your list into the field

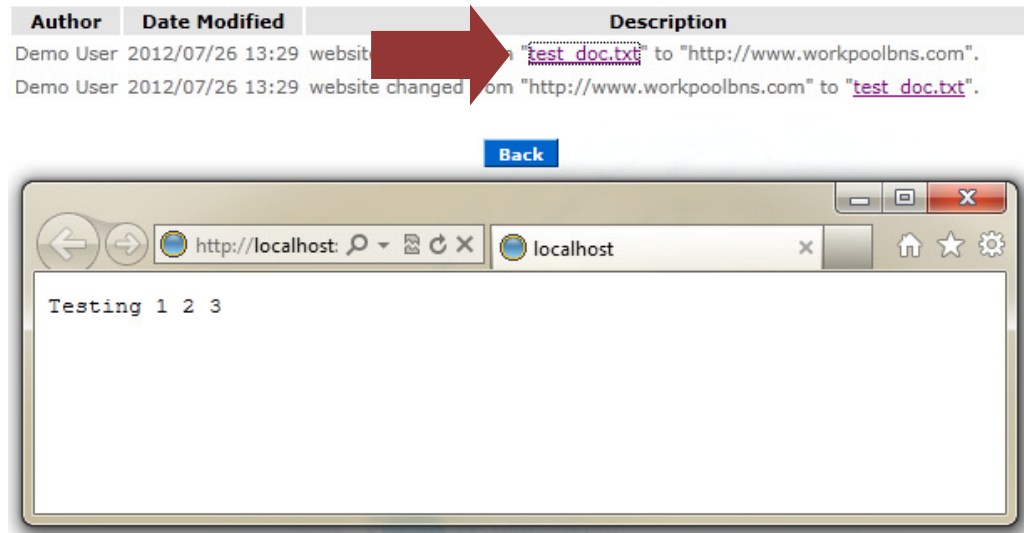
above. This is therefore a nice way to create a mailing list where you want to group a list of people together that you may need to correspond with on a regular basis or around a specific topic.

## 2. Minor Changes and Bug Fixes

- a. **(80437)** Change: An additional filter option was added to the “View Audit Entries Per Period” function under Directory Administration that will allow users to filter audit information per View Definition or Entry record changes only. This means that users can narrow the search to changes on a specific Views or Entry records only.
- b. **(79507)** Change: As part of the recent changes to allow for more fine grained control over access to information linked to Entries (see addition of “*Prevent Access to Views based on Business Unit Membership*” administration property in a previous release) a new rule was implemented to block access to an Entry’s dropdown menu, where the user does not have access to the Business Unit which the Entry is linked to. Even though WorkPool may have allowed access to the functions on this menu in the past it did not allow users to effect any changes they were not allowed to. Giving access but not allowing changes did however cause come confusion, hence the reason this was changed.



- c. **(77432)** Change: The Audit Trail screens on both Directory Entries and Views will now show references to files (URL Attributes) as hyperlinks so users can open these files from the audit trail itself.



- d. **(79334)** Fixed Bug: Some Attribute types, marked as **required** on Views, would in some cases allow users to leave fields empty rather than forcing a value to be entered. This affected the following attribute types: Addresses, Email Addresses and Phone Numbers.
- e. **(77938)** Fixed Spelling: Fixed spelling of word “Bunsiness” to “Business” on the Directory Properties screen under Administration.
- f. **(76602)** Fixed Bug: The Alert Pop up message did not appear on Group Entries.
- g. **(77055)** Fixed Bug: The Assimilation function should only remove conflicting Views (i.e. Views with the same names) when Entries are merged with the assimilation function. Any other Views on the Entry that is being removed must be moved to the Entry that is being kept. Instead the assimilation function was removing all of the Views of the Entry that was being removed, not just the ones with the same name.
- h. **(77433)** Fixed Bug: The “View Sample” button under the Directory Report Wizard would sometimes return an “Invalid Expression” or empty result, however when the person clicks on the “Run Report” link the report would return the correct values. This was due to a JavaScript error and has now been corrected.
- i. **(79240)** Change: The Directory Report Wizard function made a distinction between values that are null, i.e. do not have a value, and values that are equal to “” (an empty string). To a user these two values typically represent the same thing; however in the database these two values mean different things and therefore are not equal to each other. As a result, users who used these values in their expressions were getting results from reports that looked incorrect to them (even though they were technically correct). To simplify this for the user the Report Wizard was updated to add both expressions, i.e. “null” and “” values, to the formula.



- j. **(79068)** Fixed Critical Bug: The Export function on the Directory Reports allowed any user to export data on all Views returned in the search results, even if these Views were not accessible to a user. This was changed so that only Views accessible to the user (based on the Permission Groups) will now be listed as an option to be exported.
- k. **(81863)** Fixed Bug: Directory Export feature did not export empty field values in composite fields (like address, phone numbers, etc). This caused column misalignment.

## FILES

### 1. Minor Changes and Bug Fixes

- a. **(75927)** Fixed Bug: The “Last Documents Modified” summary on the main screen did not show all the changes applicable to a user. This was due to an error in the query that has now been corrected.
- b. **(77746)** Change: Document Search scope now includes the Document Code field.

## GENERAL

### 1. Improved support for working with files in Android & iPad (iOS) Tablet Devices (77428)

For many years WorkPool has been making use of FTP (File Transfer Protocol) as its way to manage files (e.g. attachments). FTP has been around for many years so was widely accepted and supported. However many of the mobile browsers on new devices do not support this protocol as part of their browser and as such downloading files or viewing embedded content (like pictures in an email) did not work. Thanks to a group of our clients coming together and taking the initiative to sponsor development to change this we have now implemented an alternative mechanism for file management using the same HTTP standard used by browsers. Other changes were made as part of this development, as mentioned under the section “COMMUNICATIONS (ANNOUNCEMENTS, EMAIL & SMS/TEXT MESSAGE)”.

### 2. Major Changes to underlying Cascading Style Sheets (CSS) (78616)

While the majority of our clients use Internet Explorer (Microsoft) and FireFox (Mozilla) as their Internet Browser of choice, other browsers are also gaining popularity. Among these: Safari (Apple) and Chrome (Google). The browser is responsible for the rendering and presentation of the content it receives from the WorkPool server to the user. It is therefore essential that all browsers follow the same rules in preparing and presenting content or else the screens will look inconsistent or work differently from browser to browser. The language (syntax) for defining the way web pages are displayed in a browser is called “Cascading Style Sheets” or CSS. Unfortunately, in an attempt by vendors to give their own browser an edge or make users

dependent on their browser over any other browser in the market, many of the vendors implement their own rules and render content based on their own interpretation of the CSS rules. This problem is further exacerbated by the recent rise in mobile browsing, including tablets. In an attempt to expand our support and provide users with a more consistent experience, irrespective of the device and browser used, WorkPool has made some major changes in the way we apply CSS, and our use of frames. You may therefore notice some small changes in the font (style and size), alignment and dimensions of components on the WorkPool interface. A significant amount of time and effort is required to implement these changes as such will require a lot of testing; we will continue to make incremental changes to the look and feel of WorkPool going forward.

### 3. Browser Detection and Prompt to Upgrade (77960)

As new Internet technologies become available and are incorporated into the toolsets of modern browsers, WorkPool is able to incorporate and make use of some of these new and upcoming features. Accessing these features will however require that users keep their browsers up to date to ensure that they can use and benefit from our effort in creating a richer user interface. Updating your browser will be essential for upcoming releases and changes which will, amongst others, be made to Task Lists and Task Management screens. A warning message will now appear on the WorkPool login screen to inform users when they are using a browser that is out of date and needs to be updated. Updating your browser is not yet a requirement, but highly recommended.



### 4. Minor Changes and Bug Fixes

- a. **(76198)** Change / Fixed Bug: The blue “Export” button used on some WorkPool Reports was not working as expected in some browsers. Instead the browser would add HTML content or drop characters that corrupted or changed the layout of the resulting document. This component was changed to force Internet Explorer and FireFox browsers to treat the content as plain text, therefore allowing for a more consistent result that can be imported into and viewed easily in Excel.

## **PROCESS MANAGEMENT**

### **1. HTML Template Engine for Rendering Process Information (75320)**

This is quite a powerful new extension to the process engine that will allow users to configure their own HTML templates to use as alternatives to display (render) process information. What this means for the non-technical people is that you can now replace the current Process Instance screen (the one with the purple banner displaying a summary of the tasks and process attributes) with your own more user friendly or purpose-driven page.

#### **Why is this significant / What is the benefit to you?**

A simple example of this would be to add a template to something like a “Leave Application Process” that will display the staff member’s leave application in a format that is the same as the corporate template or paper based form. You could also add your own branding to this page and print these screens to PDF for use in client communications. This could be useful for people who follow certification processes where the end result and final outcome of the process could be to print a certificate from WorkPool with the information as per the process. You now have both an original source document along with the complete audit trail (steps and actions on how it came into being) in one location! A template could also be configured to summarize a process or look like a checklist, possibly similar to a paper-base one you have right now, which will make it easier for people to read or incorporate in their existing systems.

One of the most popular development requests we receive from clients is to create a special screen that will present information from a process in a way that makes sense to them, i.e. unique to their business. With this engine any HTML designer can now build a template to format the process information for you without the need for us to write or maintain any custom code or make system changes! This means “customization” is now cheaper, faster and more people can do it!

## How does it work?

The Template Engine takes HTML (hypertext markup language) code, a type of programming language, as input. This HTML code forms the basis of your template and must typically be provided by an HTML designer or someone with suitable experience. WorkPool will read the HTML code in the template and scan it for WorkPool specific expressions and replace it with the appropriate values, such as:

- `${process.instance.id}`
- `${currentUser.displayName}`
- `${view(Resource).firstname}`

There are also other script extensions that will allow you to add functionality or information to the template itself that is currently on the WorkPool standard process instance screen, such as:

- `${actionPanel}` = Displays an Action Panel at given location
- `${taskChildList}` = Displays list of Task Children at given location

This feature was introduced as a prototype to allow our clients and partners who are interested in using or experimenting with this feature to provide us with feedback and requests for expanding upon the expressions. The HTML Template will be attached to the Process Definition in WorkPool and will also be exported / imported along with the process definition in the standard XML file. This means that you can build and test templates on your development/testing environment, export them and then import them on production when you are ready. Some sample templates will be available for download from our website at a later stage to speed up the learning process. Creating HTML templates is also something that the WorkPool Support team can do for you on special request – quotations on request.

Traditional Process Instance Screen:

 **HR: Leave Application : 176**

**Process Title :** HR: Leave Application

**Process Code :** HR\_LEAVE (v. 3.0)

**Description :**

**Reference Doc/URL :**

**Directory Entry :** [WORKPOOL \(PTY\) Ltd](#)

**Electronic Folder :** [Default Folder](#)

**Classification :**

**Status :** signed\_off

**Due Date :** 2012/08/10 14:01

**Requested By :** Demo User ([workpoolbns@gmail.com](mailto:workpoolbns@gmail.com))

**Assigned To :** Demo User ([workpoolbns@gmail.com](mailto:workpoolbns@gmail.com))

**Person Applying for Leave :** [Demo User](#)

**Type of Leave :** Normal Leave

**Reason/Details :** Vacation Time!

**First Day of Leave :** 2012/12/03

**Last Day of Leave :** 2012/12/07

**Total Number of Days Leave Required :** 5


**Approval :** Approved

**Notes :** <Unknown>

**Days Available (current incl this month) :** 15

**Days Available After (end of this month) :** 10

New HTML Template Example:

 **WorkPool Leave Application Form : 176**

**Name of Person :** 3

**Type of Leave :** normal

**Reason/Details :** Vacation Time!

Period	
First Day of Leave	2012-12-03
Last Day of Leave	2012-12-07
Total Number of Days Leave Required	5

Approval Process	
Line Manager	3
Outcome (Approval)	yes
Decision on	Pending
Notes	

Payroll Information	
Days Available After (end of this month)	10



## 2. Managing Attribute Dependencies and Preventing Conflicts (76218)

With various ways to share and update information between modules in WorkPool it is essential that the system administrator (or appropriate resources) can understand and manage the impact of making changes to Attributes on View Definitions, Processes and the expressions that link them. Various changes were made to provide better visual prompts and aids to users when making configuration changes to prevent mistakes and prompt users to action. These are:

- View Definitions:
  - A “Linked to Process” column was added to the View Definition Administration screen. If the checkbox in this column is ticked it means this View Definition is referenced from 1 or more processes.

VIEW DEFINITION ADMINISTRATION					
View Definition	View Instances	Active	Is Default View	Locked	Linked To Process
Contact	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SKI Record	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<div>Create New View Definition   Import View Definition   Back</div>					

A “Linked to Process” column was added to the “View Definition” screen listing all the attributes. As above, if the checkbox in this column is ticked it means this View Definition is referenced from 1 or more processes.

Display Order	Display Name	Attribute Type	Name	Is Required	Linked to Process	Default Value
<input type="text" value="1"/>	Department	Option	department	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="text" value="2"/>	Line Manager	Resource	lineManager	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="text" value="5"/>	Qualifications	Text	qualifications	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="text" value="10"/>	Home Email Address	EmailAddress	homeEmail	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="text" value="11"/>	Mobile Number	MobileNumber	mobile	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="text" value="30"/>	Last CV	Url	lastCV	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="text" value="99"/>	Notes	Text	notesExtra	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="text" value="100"/>	Leave Applied for	Integer	leave_app	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="text" value="110"/>	Leave Days Left	Decimal	days_left	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<div>Save   Create New Attribute   Export View Definition   Back</div>						

The Edit Attribute screen was updated to display a warning message on Attributes linked to 1 or more processes along with the names of the processes that will be affected by making this change.

**View Definition :** Subscription

**Linked Processes :** ⚠ SUPP\_UPDATE\_EAR **Support: WorkPool EAR Update**

**Name :**

**Display Name :**

**Description :**

**Attribute Type :** String

**Is Multi Select :** ☐ (Option Type Only)

**Default Value :**

**Display Order :**

**Is Required :** ☒

[Save](#) [Delete](#) [Back](#)

- Process Definitions:
  - A “Not Used” column was added to the Attributes screen (list of all attributes on a process). A Warning icon will appear to show the designer if an attribute was dropped or not used in a process. This is typical in cases where someone is reengineering a process or splitting processes into smaller parts and forgets to update or remove old attributes. It is also a good check for designers to indicate when an attribute was added to a process but is not used on any Flow in the process.

#### Attributes for Process - HR: Leave Application

ID	Display Order	Not Used	Name	Display Name	AttributeType	Required
88	<input type="text" value="20"/>		approval	Approval	Option	Yes
89	<input type="text" value="21"/>		approvalNotes	Notes	Text	No
91	<input type="text" value="31"/>		daysAvailableAfter	Days Available After (end of this month)	Decimal	Yes
90	<input type="text" value="30"/>		daysAvailableBefore	Days Available (current incl this month)	Decimal	Yes
85	<input type="text" value="10"/>		firstDay	First Day of Leave	Date	Yes
86	<input type="text" value="11"/>		lastDay	Last Day of Leave	Date	Yes
87	<input type="text" value="12"/>		noDays	Total Number of Days Leave Required	Decimal	Yes
82	<input type="text" value="1"/>		person	Person Applying for Leave	Resource	Yes
84	<input type="text" value="4"/>		reason	Reason/Details	Text	Yes
			type	Type of Leave	Option	Yes
			unused_attribute	Unused	String	No



[Save](#) [Add Attribute](#) [Back](#)

- A similar indicator has been added to the Attribute Action screen to help the designer identify any attributes that are still unlinked.
- The “Flows” section on the Edit Attribute screen was also updated to indicate warnings to the designer if this attribute is linked to an attribute on a View Definition that does not exist, is of a different type, or the list of options do not match in the case of an “Option” type attribute (a common mistake).

- Process Instance Tasks

- The most significant value will most likely be derived from the change to the standard “Update Process Attributes” screen, used by all users when they click on the “blue bubble” to update values on a process. Since attribute values can be pre-populated from information on a View there is always a risk that by the time the user updates the attribute value on the process, that the attribute on View could have changed. This creates a situation where the process may override the attribute value on the View with old or incorrect information if the user is not aware of the change. Consider also that you may have more than one process running at the same time, all updating or referring to the same attribute on the View. This screen will now perform a check every time to compare the value that is stored on the process to the value that is currently stored on the View. If there is a difference, the user will be informed and can then make a decision to update the process with the same information or proceed with the update if that is the correct course of action.

### 3. New Feature to Import Process Information (77904)

This new feature, available from the Task Administration section will allow users to import process information. This is extremely useful for taking on new data from another system, such as Microsoft Excel, when a WorkPool Process will now be driving this going forward. This will save many hours of data capturing and/or creating special scripts and reports for taking on data for new clients.



The Import tool is loosely based on the import function for the Directory and allows users to map data from a delimited file to a process and the respective attributes.

**SPECIFY ATTRIBUTES**

Step 2 of 4

Total Number of records/lines found in file : 3

Attribute	Type	Column	Mask
Person Applying for Leave	Resource	person	Resource Name/Resource Group Name
Type of Leave	Option	type	
Reason/Details	Text	reason	
First Day of Leave	Date	None Selected	yyyy/MM/dd
Last Day of Leave	Date	None Selected	yyyy/MM/dd
Total Number of Days Leave Required	Decimal	None Selected	
Approval	Option	approval	
Notes	Text	None Selected	
Days Available (current incl this month)	Decimal	None Selected	
Days Available After (end of this month)	Decimal	None Selected	
extra	String	None Selected	

Entry Folder Mapping :

Select Column to Compare to :

Create Entry if not found : ☒

Column to use as Entry name :

Publish newly created Entries to : ☒ Executive and HR  
☒ Shared

[Cancel](#) [Next](#)

Since the quality of data is extremely important in processes, where values can determine outcomes of decisions made or even update other records in the system, the import tool will perform validation checks that must all be passed before an import will be allowed. This will ensure that the data complies with the various rules based on the Attribute types specified. Mapping options exist to define masks for formatting Dates, Numbers, etc.

**PROCESS INSTANCE IMPORT VALIDATION**

Step 3 of 4

Validation Completed, 3 records passed validation.

Attribute	Type	Column	Mask
Person Applying for Leave	Resource	person	
Type of Leave	Option	type	
Reason/Details	Text	reason	
First Day of Leave	Date		yyyy/MM/dd
Last Day of Leave	Date		yyyy/MM/dd
Total Number of Days Leave Required	Decimal		
Approval	Option	approval	
Notes	Text		
Days Available (current incl this month)	Decimal		
Days Available After (end of this month)	Decimal		
extra	String		

[Cancel](#) [Next](#)

Lastly, the tool will allow the user to set up the state of the process, i.e. auto construct the process instances and associated tasks in WorkPool so that it represents a certain point in the process, as if it would have run its normal course.



## DEFAULT TASK SETTINGS



Step 4 of 4



### Default Process Instance Task Values

Title :

Description :

Specify Process Initiator :   


Specify Process Manager :   

Classification :   

Type :

Priority :

Sensitivity :

Due Date :  

Choose Task/s to Create	Flow Name	Mark as Active
<input checked="" type="checkbox"/> Complete Leave Application	A	<input type="checkbox"/>
<input type="checkbox"/> Review/Approve Leave Application \${extra}	B	<input type="checkbox"/>
<input checked="" type="checkbox"/> Process Leave Application	C	<input type="checkbox"/>
<input checked="" type="checkbox"/> Leave Application Declined	D	<input type="checkbox"/>
<input type="checkbox"/> Leave Application Successful	E	<input type="checkbox"/>
<input checked="" type="checkbox"/> Final Review of Leave Application	F	<input checked="" type="checkbox"/>

Task Note to Add to all Task/s Created as Above :

The user can select which tasks (flows) must be created and marked as active (for users to work from that point onwards) and can add explanatory notes to the audit trail of the tasks. Importing data into a process should only be done by a professional with experience in process building, as well as experience in importing of information into WorkPool in general.

## 4. Minor Changes and Bug Fixes

- (80118)** Fixed Bug: The maximum length allowed for Task Titles in the database is 100 characters. Since the process engine creates a Task Title based on the information contained in the Flow Title (which could contain expressions to be resolved in its title) it is possible that the resulting task title can be longer than a 100 characters. The process engine will now test for this and truncate the title at 100 characters before saving it.
- (81478)** New Feature: A new option was added to the "Personal Task Settings" section under "My Profile", called "Disable Task Completed Notifications on Process Tasks". If a user enables this setting he/she will not receive an email notification upon task completion of any process bound task. This will not affect normal tasks, only process tasks. The feature was built in to reduce emails in environments where people have high volumes of process tasks or work on a micro level of detail where notifications are not necessary.

## TASKS AND ACTIVITIES

### 1. Support for Multiple Attachments on a single Activity (76189)

WorkPool will now allow users to add multiple attachments/reference documents to a single activity. Previously an activity could only have one reference document attached to it. Multiple screens were affected by this change including the two add activity screens (on task and standalone activity), edit activity, activity details displayed as part of task history, the activities tab in the entry folder as well as several reports and search screens. The “Bulk File Import” feature on WorkPool (see Directory Administration) was also updated with a new setting to import multiple files as attachments on a single Activity (76269).

### 2. Time logged on Activities now recorded as a Duration – not just minutes (76189)

Previously WorkPool would record all time logged on an Activity as minutes even if the time was entered in hours. The underlying database structure was changed so that we can now store the original time unit and value as entered by the user. The impact of this change on the user is very small. People who leave activities open (to go back later to close them) will notice that the original value will now be retained (e.g. 2.5 hrs as opposed to 150min). This change affected many reports, however brings the activities into line with other objects in WorkPool that also record a duration value.

### 3. Email Notification when other people add Activities to My Tasks or Tracked Tasks (76187)

Due to popular request from users, WorkPool can now inform you by email if anyone adds an activity on a task that is assigned to you, or even one that you may be tracking. Options can now be configured by users from the “Personal Task Settings” area under the “My Profile” section and are as follows:

- Notify me when other users add Activities to my Tasks where I am the Resource
- Notify me when an Activity is added to a Task I am tracking

### 4. New Task List Prototyping (80173)

Task management is core to WorkPool and therefore changes must be considered carefully. As a result, the current Task Screens (e.g. “my tasks”, “manage resources”, etc.) have not changed much over the last couple of years. It is our intention to make some major changes and improvements to these screens in the near future to incorporate new, rich user interface functionality and add support for popular functions like dragging and dropping of content. The total time and effort put into the development alone of these prototypes (excluding analysis) was more than **300 hours**! It is our plan to introduce several new screens (views) and functions requested by our clients. These new screens have been built on top of the current WorkPool application so that we (the WorkPool Team) can start testing them internally. More information

will follow as we make progress on these developments and expand our testing team to include partners and clients who form part of the BETA testing groups and development cycles. We look forward to showcasing this to you in the future for comment.

## 5. Minor Changes and Bug Fixes

- a. **(76427)** Change: The “Resource Performance Task Summary Report” was updated to include two new columns for Tasks “Completed within Due Date” and “Completed after Due Date”. This improvement was sponsored by one of our clients.
- b. **(75928)** Change: Users are no longer allowed to enter “0” as a repeat duration on recurring tasks. This is to prevent users from creating a scheduler that will create high volumes of tasks by accident.
- c. **(75929)** Fixed Bug: As Processes can be configured to make child tasks or even the Process Parent Task itself confidential; it was possible that WorkPool could attempt navigate the user to a child or parent task (as part of completing a task) the user did not have sufficient permission to view. This would then cause a security exception error to appear on the WorkPool interface. Changes have been made to prevent the security error from being displayed and instead, a more user friendly error message is now displayed.
- d. **(76061)** Change: The Task Script Administration interface will now sort items alphabetically based on the item tree (hierarchy).
- e. **(76063)** Fixed Bug: The content of the “Documents” panel on a task was sometimes misaligned in the browser if the “Metrics” panel was expanded at the same time. This has now been fixed for all popular browsers.
- f. **(76380 & 76851)** Fixed Bug: Changes to the Item link on a task was not recorded on the audit trail. In addition, removing an item link from a task was causing a Number Format Exception to occur.
- g. **(76791)** Fixed Bug: The Task Classification lookup control was not removing assimilated classifications from the list unless the user logged out and in again. The cache is now updated when the Classification is assimilated and no longer requires the Administrator to log out and back in again to see the updated list.
- h. **(77318)** Fixed Bug: Process Instance Tasks remained **bold** in the task lists even after the resource opened the screen. As **bold** indicates to a user that a task has been “modified” since the resource last looked at the Task, this has been corrected.
- i. **(77391)** Fixed Bug: In some cases where a task had a Next Action date that was in the past and the user clicked on the “Add to Today’s Tasks” checkbox on the normal “Show Task” to change the date to today, the screen would not update the Next Action date and pop up an alert message. This was fixed.
- j. **(77434)** Change: The “Task Classifications” report (under “Task Reports”) displayed a default search result when going to the screen the first time. Report was changed to default to 0 results, now prompting the user to make a selection first.

- k. **(77436)** Fixed Bug: Both escalation and de-escalation of tasks resulted in a note being added to the task audit trail saying “Reason for Escalation”. This was corrected so that the appropriate note is added for de-escalations.
- l. **(77437)** Fixed Bug: When you create a new task from an email the task title will default to the subject of the email. However if the user changed the title and then made a mistake on the screen (e.g. not adding a compulsory value or an invalid date) then the title would revert back to the subject of the email, rather than retaining the value typed in by the user (if different).
- m. **(77475)** Fixed Bug: The algorithm used by the “Task Search” feature to find and highlight words on the screen (e.g. “hello peter”) would not work as expected when searching for small fragments that repeat in the same work. E.g. if an Activity has a Title of "aaaa" and the phrase being searched for is "aa" the code would interpret "aaaa" as containing 3 instances of "aa" (i.e. can fit “aa” in 3 times in the same word, beginning, middle and end). This caused a StringIndexOutOfBoundsException Error.
- n. **(77859)** Fixed Bug: Under some conditions the action taken by the owner of a task to change information on the task and also change the status of the task would record the status change twice in the audit trail. It would be recorded as a change (along with the other changes) and then separately as a status change as well. This status change is now recorded only once.
- o. **(79162)** Fixed Bug: The user profile setting to auto archive tasks that are “Signed Off as part of a process where I am the Owner of the task” was not working as intended. This feature has now been fixed to function in line with its original intention.
- p. **(81902)** Change: Based on popular request the “Resource Task Status Report” was updated to include a new column called “Expired Next Actions”. This column will indicate the number of tasks assigned to a person where the Next Action date is in the past (expired).

## WORKPOOL SYSTEM ADMINISTRATION

### 1. Minor Changes and Bug Fixes

- a. **(76181)** Fixed Bug: The Resource Administration screen did not allow for an apostrophe character in the Display Name, i.e. the ' character.
- b. **(77862)** Change: A Business Unit License Counter was added to the Business Unit Administration screen. This is similar to the one on the Internal Resources screen.
- c. **(80635)** Fixed Bug: A Resource could be added to both the “Member” and the “Access to” roles on the same Resource Group (see “Security and Permissions” section on Internal Resource). This was incorrect as a user must either be a member OR have access, but not both.