

## WORKPOOL RELEASE NOTES

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WorkPool Version : 4.4.6  
Release/Batch Number : 82192

Internal Build Date : 2012/11/07  
Notes Prepared By : Marius Botha

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### **IMPORTANT NOTICE, PLEASE READ:**

For your protection, this version of WorkPool will automatically update the logon and password management functions in the system and implement new rules around the username and password criteria. Upon installation of this version **WorkPool will require all users to change their passwords during their first logon attempt**. More details on this can be found below (see 82203 & 82207).

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#### **Summary of Modules / Components Affected:**

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

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## CHANGE LOG DETAILS

### CALENDAR

#### 1. New Calendar Module with Rich User Interface functionality as well as New Week and Month Views (82197)

In keeping with our efforts to continuously improve WorkPool and make our product as user friendly as possible we have implemented a more feature rich interface for the calendar. This includes click-and-drag for creating new events and drag-and-drop support for rescheduling existing events.

Clients are reminded to update their Internet browsers to a version that has support for these features as per our guidelines. In addition, the colour scheme for the calendar module was changed to a maroon colour to avoid confusion between this module and the Directory.

#### New Month View:

The screenshot displays the 'MY CALENDAR' application interface. At the top, it shows the current date as 'SERVER DATE: WEDNESDAY, 26 SEP 2012'. The main view is a month calendar for 'September 2012'. The interface is styled in a maroon color scheme. On the left, there is a sidebar with a 'View Calendar for:' section containing a search box and three checked options: 'Internal Resource Calendar', 'Google Calendar', and 'My Calendar'. The main calendar grid shows events for each day of the month. For example, on Monday, 26th, there is an '8a Staff Meeting'. On Wednesday, 27th, there are two '12p My Appointment 2' events. On Friday, 28th, there are two '12p Client Meeting' events. The events are color-coded and include time slots.

**New Week View:**

**New Day View:**

New Calendar Features include the following:

- The ability to drag an appointment to a new day and/or time to set the appointment date and time.
- Click and drag (up or down) the handle at the bottom of the appointment box to increase or decrease the appointment duration.
- Click and drag on an empty space to create a new calendar event on the week or day Views, making the creation of a basic calendar event incredibly quick and easy.
- The ability to add “Calendar Feeds” onto your own calendar to show events and information from other sources such as:
  - Calendar Events for other Resources
  - Shared Google Calendars ([viewing only, cannot change](#))
  - Recurring Tasks Dates
  - Date Attribute values from Processes or Views, which is useful to display client’s birthdays or renewal dates on your calendar directly from your Directory Views. ([viewing only, cannot change](#))
- Existing Features such as the “Calendar Search” function, as well as the “View Calendar for” feature was updated to the new look and feel.

## COMMUNICATIONS (EMAIL & SMS/TEXT MESSAGE)

### 1. Support for Email Paging on Inboxes (WorkPool and General) (82198)

Paging was implemented on the “My Email” section in WorkPool on both the “WorkPool” and “General” Inboxes. This new feature will assist users who have an unusually large number of emails in their mailboxes by loading only a smaller subset of their emails, one page at a time. This is to conserve WorkPool server resources and ensure that one user’s lack of action in attending their emails does not negatively impact the other users who do manage their mailboxes the WorkPool way. Example provided below.



Pr	A	From	Subject	Sent On
<input type="checkbox"/>	<input type="checkbox"/>	The Register - News	Reg Headlines Tuesday April 14	2009/04/14 17:16
<input type="checkbox"/>	<input type="checkbox"/>	Carol Carter	Party this weekend (Private email)	2009/04/14 17:24
<input type="checkbox"/>	<input type="checkbox"/>	Roberto @ OASIS	XML Daily Newslink. Thursday, April 2009	2009/04/14 17:25
<input type="checkbox"/>	<input type="checkbox"/>	<b>Peter Pan</b>	<b>Complaint - The Oaks BCP11534/7 - PAL1970</b>	<b>2009/04/14 17:28</b>
<input type="checkbox"/>	<input type="checkbox"/>	wine@boncourage.co.za	Bon Courage Website Order	2009/04/14 17:29
<input type="checkbox"/>	<input type="checkbox"/>	Peter Pan	Process Diagrams - Confirmed	2009/04/14 17:36
<input type="checkbox"/>	<input type="checkbox"/>	mariusbotha76@gmail.com	IMG-20120423-00051.jpg	2012/04/26 15:46
<input type="checkbox"/>	<input type="checkbox"/>	<b>SpringSource News</b>	<b>Spring MVC 3.2 Preview: Introducing Servlet 3, Async Support</b>	<b>2012/05/22 10:23</b>
<input type="checkbox"/>	<input type="checkbox"/>	<b>SpringSource Events</b>	<b>SpringOne 2GX: October 15-18, 2012 - Registration Open</b>	<b>2012/05/30 21:26</b>
<input type="checkbox"/>	<input type="checkbox"/>	<b>Spring Online Events</b>	<b>Live Webinars: Spring Integration and RabbitMQ</b>	<b>2012/06/11 17:09</b>

**PLEASE NOTE:**

- Users are still encouraged to keep the number of emails in their inboxes (both read and unread) to a minimum as per our best practice guidelines. The WorkPool email module was designed to assist users to manage their email communication more effectively and not for users to fall back on using emails as a replacement for the Task Managements features and reminder systems. By not linking and filing away emails you are exposing the business to risks.
- Due to these changes, the column configuration and sorting order settings for these pages will be reset to the default. Users with existing configurations will have to reconfigure these to reflect their preference.

The page-size (i.e. how many emails should be displayed on a single page) can be changed by the Administrator under the "System Email Settings" section (see Email Administration Section).

**System Email Settings**

**Settings** | **Disclaimer**

**Outgoing Mail Server (SMTP) :** 0.0.0.0

**Authentication Required :**

**Username :**

**Password :**

**Port Number :** 0 (Default 25)

**SMTP over secure connection (SSL) :**

**Max Number of emails to Send (per hour) :** 0

**Force Spell Checking on All Email Messages :**

**Number of emails to display per page :**  **Set to the desired number of emails per page.**

**Save**

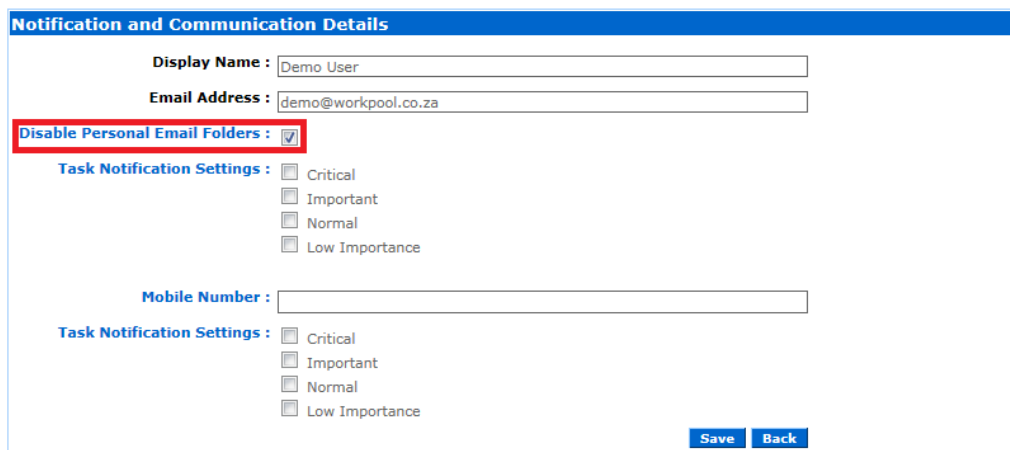
**Mailboxes using IMAP protocol:**

Mailboxes configured on IMAP with the "Auto Import" setting enabled will not be affected by this change. Mailboxes that have the "Auto Import" setting enabled will function in the same manner as a POP3 mailbox. For users making use of normal IMAP without auto import, please note the following changes:

1. Only one IMAP mail account (mailbox) is allowed in your group of mailboxes, i.e. you can still have multiple POP3 and IMAP (with auto import) accounts but only one IMAP account without auto import.
2. The IMAP mailbox will now be listed as a separate Inbox folder. Emails arriving in this mailbox will not be listed under the WorkPool or General email boxes until such time as they have been imported. Users cannot link these emails to Tasks or Directories until such time as they have been imported into WorkPool, just as before.
3. The IMAP Inbox Folder does not support paging. This is because emails are read directly from the folder on the mail server. I.e. WorkPool loads all emails into memory to receive this content from the email server and there is therefore no performance benefit in creating pages to browse information that has already been downloaded.

## 2. Ability to Disable use of Personal Email Folders (82199)

The standard WorkPool Email module allows users to create and maintain their own Personal Email Folders (similar to Outlook), however company policies around email communication can differ substantially, specifically with regards to Compliance requirements as well as the cost considerations around making provision to store personal communications on company systems. A new setting was added to the Resource User Profile section which allows the Administrator to enable/disable the Personal Email Folder functionality on a user level, i.e. manage who is allowed to create or use Personal Email Folders. Any pre-existing Personal Folders and emails linked to these folders will still be accessible to the user should this feature be disabled after the fact and old emails can still be moved out of the Personal Folders if there is a need. Once access has been restricted, new emails can no longer be moved into existing Personal Folders and no new Personal Email Folders can be created. A screenshot is provided below as reference.



**Notification and Communication Details**

Display Name :

Email Address :

**Disable Personal Email Folders :**

**Task Notification Settings :**  Critical  
 Important  
 Normal  
 Low Importance

**Mobile Number :**

**Task Notification Settings :**  Critical  
 Important  
 Normal  
 Low Importance

## 3. Minor Changes and Bug Fixes

- a. **(82719)** Fixed Bug: Corrected the issue where the BCC email addresses were visible to users on an email when viewing the email from the Task it was linked to.
- b. **(82613)** Fixed Bug: Corrected an issue under the Email Search feature where the email search could return results with emails the current user did not have permission to see based on the Entry folder or Sensitivity.
- c. **(82563/82818)** Fixed Bug: Corrected the wording on the Escalation /De-escalation email notification where the message would incorrectly indicate that the Task was being escalated when it was in fact being de-escalated. We also corrected the issue where the de-escalation notification email to the resource contained the word "NULL" in the body in cases where no reason was provided for the de-escalation by the Task Owner.

- d. **(84244)** Fixed Bug: Escalation Feature for Tasks Assigned to Resource Groups did not list the members of the group, only a blank list.
- e. **(83221)** Fixed Bug: Due to changes made in the previous update to WorkPool around access to emails based on the email's sensitivity and users related to it, the email search allowed access to certain emails that should not have been accessible to other users. These rules were changed again and applied to the search screen to prevent this.
- f. **(83274)** Fixed Bug: WorkPool did not allow users to search email content if one of the words in their criteria was 1 or 2 characters long, instead of testing that the entire phrase is longer than 2 characters.
- g. **(83258/83136)** Fixed Bug: Sending individual emails from the "Group Message Function" failed or created only 1 email under certain conditions. Furthermore, if the user had no email account configured to send these messages from, a blank error message appeared with no explanation as to what was wrong. This was fixed to show an appropriate error message that explains to the user that they must first configure an email account before using this feature.
- h. **(82820)** Confirmed Issue, not fixed: Users reported that while typing emails on an iPad (Safari browser) the text input cursor as well as spelling pop-up is miss-aligned. This was confirmed as a bug by the component provider of the email editor; however they have not yet created a fix for this. In the mean time, users can work around this by opening an email in a new tab.
- i. **(85224)** Bug Deferred to Next Release: From preliminary information received it appears that recent changes in Google Gmail's implementation of the IMAP protocol no longer allows for concurrent access to a user's mailbox. This is a requirement of the WorkPool email client to be able to report the arrival of new email, count the number of messages in the inboxes and display/import the emails viewed. This will be investigate further and addressed in the next release. Only users using IMAP without Auto Import will be affected.

## DIRECTORY

### 1. Minor Changes and Bug Fixes

- a. **(82918)** Bug Fixed: The "Create one new Task and add all files as individual Activities" under the "Batch File Import" feature was not attaching the files as attachments to the activities.
- b. **(82321)** Bug Fixed: The date filter under the "Text Message Tab" under the "Entry Folder" did not work.

## ITEMS

### 1. Minor Changes and Bug Fixes

- a. **(82652)** Fixed Bug: The “View Item” screen did not format line breaks in the description field.

## GENERAL

### 1. New General rule to limit Oldest Date values allowed **(82202)**

Due to users sometimes specifying incompatible date format settings when they configure their own date format preferences it was possible for them to set very old, or invalid, Date values for tasks, etc. A new rule has now been implemented on Tasks, Activities, Calendar Events and Items to prevent this from happening by only allowing dates after 1 January 1990.

### 2. Adding Indexes to Database Tables **(83278)**

We generally do not build in any logic or optimisations in the database part of the WorkPool application so we can allow our clients choice between database providers. However since all of our clients make use of MySQL we thought it prudent to add some indexes to speed up queries, specifically with regards to Email Messages due to the large number of relationships an Email Message record has with other records in the system. Four indexes were added.

### 3. Minor Changes and Bug Fixes

- a. **(82213)** Minor Changes: Continued Look and Feel changes to improve and correct issues such as alignment, functionality, spelling mistakes and visual discrepancies between different browsers.



## PROCESS MANAGEMENT

### 1. New Feature: Date Attributes as Alternative to Durations (Due Dates) on Flows (82201)

In the past, due dates on process tasks were fixed and calculated based on the “Duration” value specified in the Flow (the Task Template). The process engine would calculate the due date of the task it was creating at each step by adding the duration value to the current date and time. This was in most cases sufficient as the rule of thumb was that each step in the process was a unit of work that had a predetermined or typical amount of time allocated to it and it would stay the same irrespective of previous tasks being performed on time or not. The thinking was that the actions of one user or department, causing a possible delay by completing their task late, would not cause a problem or crises for another user or department. However in practice, companies often need to work with fixed due dates and/or ensure that the overall process still gets completed on time, irrespective of whether one task was late and/or the buffer time allocated for delays was insufficient. Towards this end we have now built in a new feature in WorkPool that will allow the designer more fine-grained control over dates in the process. Existing processes will be migrated automatically to retain their original duration settings; however the following additional options have been added and can now be used:

- The Duration value can be substituted with a Date attribute value, where this date attribute is either an attribute on the process, or a standard date attribute as defined on the process instance. These following expressions are allowed:
  - `${process.instance.dueOn}`: Where this refers to the Due Date of the Process Instance Task.
  - `${process.instance.createdOn}`: Where this refers to the date the Process Instance Task was created.
  - `${< Date or DateTime attribute on the process>}`: Where this could be any Date or DateTime attribute on the process as defined by the designer.
- Using an offset value for any date defined in the expression. This is significant as it allows the designer to calculate task dates based on any of the dates accessible through the expression values mentioned above. You can now create a Task that is due, for example, 30 days after the process was started, or 5 days before the contract date agreed to with a client, or 2 days before an employee goes on leave (where the contract date or leave start date is an attribute on the process). It also allows you to build rules that can compensate for weekends or public holidays.
- If the express is invalid or the result is null, e.g. in cases where the designer is using a date field in an expression but the attribute was never populated from a flow, the engine will substitute the value with the current date and time as well as mark the task as critical and add an explanatory note to the Task History to indicate that a problem occurred. This will allow the process to continue without error.

The Flow screen was updated to include a new icon to toggle between the original and new options as indicated below.

**EDIT FLOW**

**Process Definition :** HR: Leave Application

**Flow Name :**

**Task Title :**

**Description :**

**Flow Type :**

**Flow Process :**



**Owner Expression :**

**Resource Expression :**

**Entry Expression :**

**Additional Resources :**

**Contact Person :**

**Duration :**    

**Skip Saturday :**


**Skip Sunday :**

**Skip Reserved Days :**

**Estimated Time :**

**Ref Doc :**

Clicking on the icon will reveal further options as indicated below.

**Duration :** [Click to see options...](#)    

**Skip Saturday :**

**Skip Sunday :**

**Skip Reserved Days :**

The “[Click to see options ...](#)” link will provide you with a list of expressions you can use, where this list is generic based on standard expressions as well as any date attributes defined on the process. Use the “Add” or “Subtract” options in the dropdown to configure a duration offset value to add or subtract. Leave the duration value on “0” to use the date on its own with no offset.

## 2. Changes to the Look and Feel of the Standard/Generic Process Instance Screen (82210)

The Process Instance Screen, also known as the Process Parent Task or Process Summary Screen, presents a user with a summary of all the process attributes and the statuses of all the child tasks (i.e. flows on the process). Since each process is unique, containing any number of attributes and/or tasks, the original screen was designed to work in a way that was generic and could accommodate any number of tasks and attributes. For this reason it is more difficult to design these types of screens to make them both functional and pretty at the same time when

the content may vary substantially from one process to another. In addition, the original intent was to make this screen distinctly different from a normal task screen to ensure the user did not confuse the two, so the Process Instance screen had a purple bar at the top of the screen instead of the normal blue for tasks.

**HR: Leave Application : 115**

**Process Title :** HR: Leave Application  
**Process Code :** HR\_LEAVE  
**Description :**  
**Reference Doc/URL :**  
**Status :** Received and in Progress  
**Priority :** Normal  
**Type :** Administration  
**Classification :**  
**Sensitivity :** Normal

**Participants**  
**Process Manager :** Demo User  
**Process Initiator :** Demo User  
**Process Owner :** Demo User  
**Directory Entry :** [WORKPOOL \(PTY\) Ltd](#)  
**Electronic Folder :** [Default Folder](#)

**Dates**  
**Created On :** 2012/09/07 15:55  
**Next Action :** 2012/10/05 15:55  
**Due On :** 2012/10/26 15:55  
**Time From Due Date :** 03 days 1.13 hrs  
**Date Completed :** Not Completed  
**Archived :** No

**Metrics**  
**Documents**

**Process Attributes**

**Person Applying for Leave :** <Unknown>  
**Type of Leave :** <Unknown>  
**Reason/Details :** <Unknown>  
**First Day of Leave :** <Unknown>  
**Last Day of Leave :** <Unknown>  
**Total Number of Days Leave Required :** <Unknown>  
**Approval :** <Unknown>  
**Notes :** <Unknown>  
**Days Available (current incl this month) :** <Unknown>  
**Days Available After (end of this month) :** <Unknown>

**Process Bound Tasks**

Ref	Title	Status	Assigned To	Days	Next Action	View
116	<a href="#">Complete Leave Application</a>		Demo User	-45 days	2012/09/07	

**History**  
**Stop Process Instance**

The process instance screen still does not allow a user to perform (log) any actions against it since it performs the function of a container for information and actions should be taken on the child tasks as per the steps in the process. As such all content, including emails, task notes, etc. were hidden by default from the users on this screen. However, in line with the continued improvements to the process engine and new features added to the normal task screens, a decision was made to change the look and feel of the old (Purple) Process Instance screen and bring it closer to the look and feel of the normal task screen. The process instance screen is still distinctly different to the normal task screen in both its appearance and function, but it now supplies access to the additional information common to normal and process tasks such as: Create and Due Dates, Participants, etc. In addition, an expandable “History” section was added to the bottom of the screen to view Audit Note information and emails that may have been

linked to this process task by users. Since actions are performed on child tasks there is no option to add activities to the process task directly from this screen. This is because the process instance task is still considered a “Container Task” and as such is not meant to be used in a way that is similar to normal Tasks.

It is likely that this screen will undergo further changes in the near future as we continue to adapt and change it based on feedback and new requirements. Please note that if you have designed your own HTML Process Template as a substitute for the default Process Instance screen, this default view may not be visible and may require the user to switch to the standard WorkPool screen.

### 3. New Resource Expressions for Advanced Auto Assignment with Resource Groups (82211)

Until now the only options allowed when using resource groups for task assignment was:

- Assigning a task to the group itself, e.g. `group(Shipping)`
- Assigning a task to the manager of the group, e.g. `group(Shipping).manager`
- Assigning a task to the quality assurer of the group, e.g. `group(Shipping).qualityAssurer`
- Assigning a task to a random member of the group, e.g. `group(Shipping).member`

The “member” expression above performed no logic and simply chose the first member in the group it could find. The member expression has now been replaced with the following 3 options:

- `group(<group name>).chooseRandom`: This expression will automatically assign a task to any individual member of this Resource Group. WorkPool will pick any resource in this group at random, so there is no guarantee that a specific person will be assigned or that there will be no repeat assignments to the same person or that everyone in the group will receive a task. This is most similar to the previous “.member” expression however it contains logic to improve the randomness of the selection.
- `group(<group name>).chooseAlphabetical`: This expression will automatically assign a task to an individual member of this Resource Group. WorkPool will cycle through all the members of the group in alphabetic order and a new resource will be chosen every time based on last person that was assigned work from this group. The next user in the list follows alphabetically on the last one that was assigned a task.
- `group(<group name>).chooseLeastTasks`: This expression will automatically assign a task to an individual member of this Resource Group based on their current workload; where WorkPool will assign the task to the user it assumes has the most capacity based on a “best guess”. This “best guess” is based on the number of Tasks currently assigned to each member, and the one with the least number of tasks will be chosen. This option will typically work best in cases where all the resources in the group do the same type of work (only) so that their workflow levels stay more or less equal.

**Please note:** Older processes using the “.member” expression will automatically be migrated to the “.chooseRandom” expression.

#### 4. Changes and Improvements to Resource Group Maintenance (82211)

The Resource Group maintenance screens were updated to add new features. These are expanded upon further down below as part of the “Task & Activities” section; however some changes were made that relate specifically to the Process Engine which will be listed in this section.

Since Resource Groups are used to define “Roles” when assigning tasks to resources on a process, changing the parameters of a group (e.g. the name) may have unintended side-effects on the processes that depend on it and could “break” the process! The new Resource Group maintenance screen will now list all the processes in WorkPool that make use of this Resource Group as per image below. Should an administrator change the name of a Resource Group the system will now allow him/her to update the process definition references at the same time. This is a great timesaver as you no longer have to create a new version of a process just to change the name of the group and eliminates the risk of existing processes no longer working as expected. Rules have been built into the process engine to compensate for cases where groups no longer exist, but these should not be used for design purposes.

**Resource Group Maintenance Form:**

- Name:
- Manager:
- Quality Assurer:
- Auto Transfer Ownership Setting:
- Active:

**Internal Resources:** Demo User, Joe Smith

**Internal Members:** Peter Parker

**External Resources:** Global Couriers (External Service)

**Resource Group Task Statistics:**

- Total Active Tasks Assigned: 4
- Total Tasks Assigned: 4
- Last Task Assigned: [TASK:136] - 2012/09/10 14:15

**References to this group on following Process Flows:**

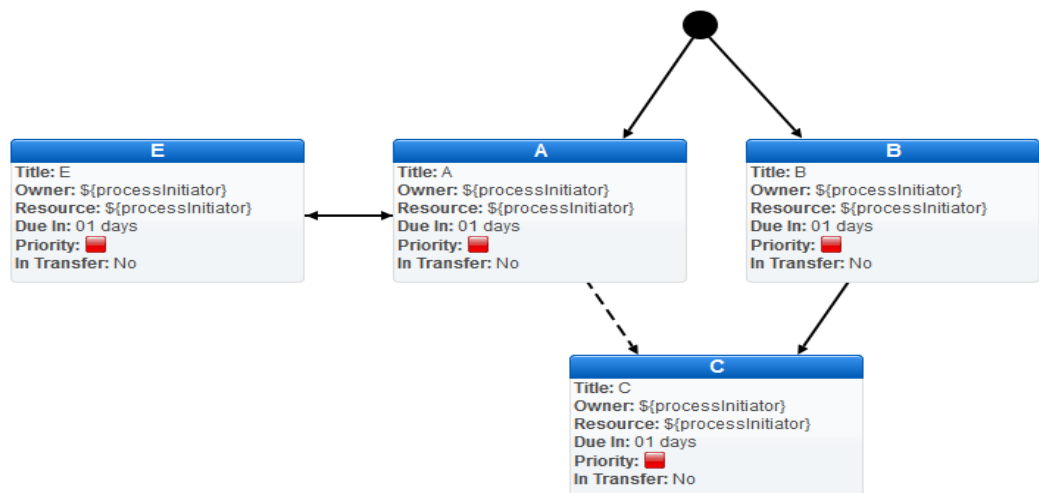
ID	Process Definition	Name	TaskTitle	Type
21	HR: Leave Application	C	Process Leave Application	task
9	HR: Leave Application	C	Process Leave Application	task
27	HR: Leave Application	C	Process Leave Application	task
15	HR: Leave Application	C	Process Leave Application	task
3	HR: Leave Application	C	Process Leave Application	task

## 5. Audit Trail to record Changes to a Process Task, including Deletions (82206)

In cases where clients have custom development on WorkPool or make use of special purpose screens, these screens will now record changes as part of the Process Instance Task, along with any deletions (process rollbacks) that may occur.

## 6. Minor Changes and Bug Fixes

- a. **(82919)** Minor Change: Under certain circumstances it was possible to click the “Submit Details” button on a Task quickly enough so that two “Task Completed” messages were sent to the Process Engine instead of just one. Depending on the process, this could create a situation where WorkPool created duplicate tasks. This has been corrected by programmatically disabling the “Submit Details” button on the first click.
- b. **(83546)** Fixed Bug: This issue only applies to clients with Custom Screens used for starting processes, where the process may have multiple starting transitions and where these starting transitions have conditional expressions. The Task Engine did not factor in the possibility of these starter tasks not existing and stopped the process in certain cases. This only affects a very small number of clients with custom screens used to start processes.
- c. **(84284)** Fixed Bug: This is another “advanced” case explained by means of a diagram below. In this case a process that split (forked) at one point and was suppose to join again at a later point, resulted in the one leg of the fork continuing without waiting for the other one to complete. This was because the one fork had a loop that was built into the logic that could result in the same tasks being created multiple times (as it loops until the condition is satisfied as per example below A to E and E to A). The process engine did not evaluate this as a condition before, however support has now been added for this situation, as depicted below in the provided diagram.



## TASKS AND ACTIVITIES

### 1. Auto Transfer Function and Other Improvements to Resource Groups (82211)

Building on the Resource Group improvements mentioned under the “Process Management” section above we have also built in new Resource Assignment features to further expand upon the use of Resource Groups in normal Task Assignment. These features also apply to the Process Engine.

A new field called “Auto Transfer Ownership Setting” has been added to Groups to allow an Administrator to assign default behaviour to tasks transferred to a Resource Group. Previously, ownership transferred to a Group would result in either the Manager, the Quality Assurer or a Member (who accepts ownership on behalf of the group) becoming the new Task Owner. With this new setting we allow more fine-grained control with regards to who becomes the owner of a task, whereas these rules work in conjunction with tasks created by the Process Engine. The options available are:

- Do Not Transfer (Default)
- Transfer Task Ownership to Manager
- Transfer Task Ownership to Quality Assurer

**RESOURCE GROUP**

Name : HR: Leave Applications

Manager : Demo User

Quality Assurer : Joe Smith

Auto Transfer Ownership Setting : Do not Transfer

Active : Do not Transfer  
Transfer Task Ownership to Manager  
Transfer Task Ownership to Quality Assurer

Internal Members

Demo User  
Joe Smith

Peter Parker

Grant Access To

External Resources

Global Couriers (External Service)

External Members

Resource Group Task Statistics	
Total Active Tasks Assigned	4
Total Tasks Assigned	4
Last Task Assigned	[TASK:136] - 2012/09/10 14:15

Save Back

The “Auto Transfer Ownership Setting”, combined with the new expressions for assigning resources will prevent situations where users were cherry-picking (i.e. pick and choosing) or not attending to tasks they wanted to ignore. If there is no one (resource) clearly responsible for a task it could be left unattended as no one knows who's going to be working on it in the group. Please remember that with Resource Groups you can indirectly assign or transfer tasks to people (to do) from users who may not have access to these users directly. E.g. a call centre agent can assign a task to Support Group but may not assign it directly to a person in Support and in doing so bypass the assignment rules/system.

The new “Resource Group Task Statistics” panel will show the administrator if a group is being used actively as well as how many Tasks/Resources will be affected by any changes made to this group by providing accurate work load and usage figures.

## 2. Changes to Recurring Task Ownership/Management vs. Task Ownership (82200)

As the application of recurring tasks in the enterprise changes and evolves over time, a new role has been introduced to allow companies to better manage recurring tasks by splitting the ownership and management of a recurring task from the actual task that gets created from it. I.e. a Recurring Task can now be created and Managed by one user, Owned (same as the normal Task Owner) by a second resource and finally be assigned to a third resource or group. Recurring Tasks themselves can now be moved to other resources without affecting the ownership and assignment of the tasks that get created. A typical application of this would be where one department or user is responsible for the loading and maintaining of all these recurring tasks (scheduled) but other parties are responsible to act on and sign off on the work involved. This change resulted in several screens being updated as listed below and some labels and buttons being renamed to clarify its use and avoid confusion.

**SCHEDULE RECURRING TASK**

Recurring Task Title :

Start Process : None Selected

Description :

Entry Folder :

**Task Owner :** Demo User (3)

Assign To : Demo User (3)



As indicated above the new field on the Schedule Recurring Task Screen allows the Recurring Task Manager to assign Ownership of a task (to be created) to a user other than him/herself while retaining control of the recurring task itself.

RECURRING TASKS								
Recurring Tasks Managed by Me (1 items)								
Title	Assigned To	Task Owner	Entry Folder	Item	Due	Final Occurrence	Active	
This one is for me to do	Peter Parker	Peter Parker	WORKPOOL (PTY) Ltd		2012/10/26 09:26	2012/12/21 12:00	<input type="checkbox"/>	
<a href="#">Add</a>								
Recurring Tasks where I am the Task Owner but not the Recurring Task Owner (2 items)								
Title	Assigned To	Recurring Task Owner	Entry Folder	Item	Due	Final Occurrence	Active	
testing bug	Joe Smith	Demo User	WORKPOOL (PTY) Ltd		2012/09/14 09:16	2012/09/13 12:00	<input type="checkbox"/>	
Testing Recurring Tasks	Joe Smith	Demo User	WORKPOOL (PTY) Ltd		2012/09/14 14:57		<input type="checkbox"/>	
All Recurring Tasks assigned to me (1 items)								
Title	Assigned To	Task Owner	Recurring Task Owner	Entry Folder	Item	Due	Final Occurrence	Active
This one is for me to do	Peter Parker	Peter Parker	Peter Parker	WORKPOOL (PTY) Ltd		2012/10/26 09:26	2012/12/21 12:00	<input type="checkbox"/>

The distinction between the Recurring Task Manager and the Task Owner also affects the way we display the Recurring Tasks, as depicted above. The screen is now broken into 3 parts indicating the Recurring Tasks you Manage, Recurring Tasks where you are the Task Owner but not the Recurring Task Owner and lastly a list of All Recurring Tasks assigned to you.

The "Reassign Recurring Task Ownership" function under Task Administration was also updated to make use of this role. An additional option was added called "*Change Task Owner role on all Recurring Tasks to be the same as the Recurring Task Owner*" that will allow the administrator to change the Task Owner role on the Recurring Tasks at the same time. This is to save time in cases where the person you are moving these tasks from has left the company or changed roles.

Please note that due to these changes, the column configuration and sorting order settings for some of these pages will be reset to the default. Users with existing configurations will have to reconfigure these to reflect their preference.

### 3. Minor Changes and Bug Fixes

- a. (82209) Minor Change & Bug Fixed: In some cases, searching for key words under the advanced "Task Search" screen would not bring back the correct number of results; in addition a new option, "Tasks Due Between", has also been added to this screen.
- b. (82821) Fixed Bug: Attaching multiple files to a standalone Activity (not linked to a Task) would not retain/save these files on the Activity after pressing the "Save" button, even though the list of attachments were visible on the task after saving the information.
- c. (82208) Fixed Bug: Last 15 Actions did not support certain HTML characters that could result in an incomplete or erroneous list.
- d. (82271) Minor Change: Original maximum length of 100 characters now enforced for Task Titles. This corrected an issue where Task Titles that were longer than the acceptable Task Title length would cause an error when the user tried to create the Task. This issue would typically occur in cases where WorkPool tried to assist the user by

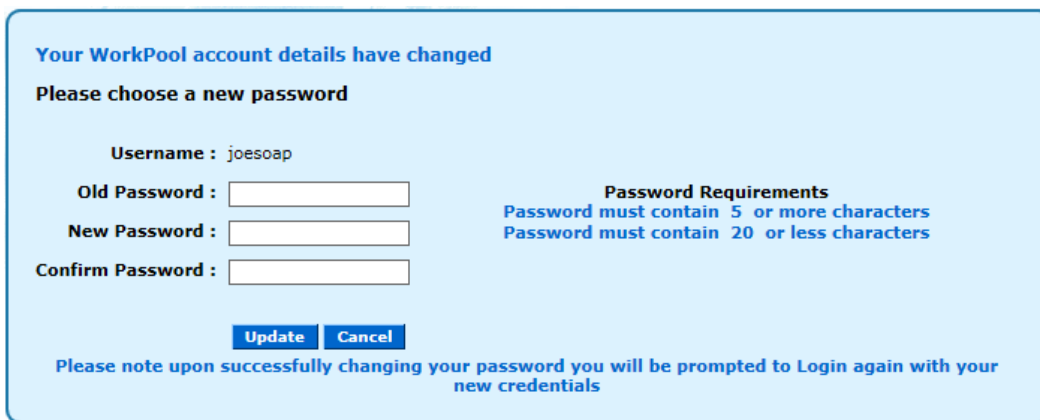
automatically populating the Task Title for them from an Email Subject line when creating a Task from an email. WorkPool will now truncate any additional characters after the maximum allowed in the title.

- e. (83366) Fixed Bug: The values displayed in “Read only” Text/String Attributes on a process did not wrap the text when viewed from “Update Attribute Instance” section on a Task.

## WORKPOOL SYSTEM ADMINISTRATION

### 1. New Password Expiration Feature and Account Management Rules (82203)

As per the notice on the first page of this document, this version of WorkPool implements several new features and changes with regards to the management and control of usernames and passwords in the system. These changes will offer clients more and/or better protection against intruders making illegal access attempts as well as automate some of the management functions around implementing company policies around username and password rules. To ensure that all users comply with these new rules **WorkPool will automatically prompt users logging in for the first time after the update to change their password**. The following screen will appear requesting the user to enter their old/current password and their new password.



The screenshot shows a light blue dialog box with a rounded border. At the top, it says "Your WorkPool account details have changed" in blue. Below that, it says "Please choose a new password" in bold black. The dialog contains the following fields and text:

- Username :** joesoap
- Old Password :** [text input field]
- New Password :** [text input field]
- Confirm Password :** [text input field]
- Password Requirements**
  - Password must contain 5 or more characters
  - Password must contain 20 or less characters
- At the bottom, there are two buttons: "Update" and "Cancel".
- Below the buttons, it says: "Please note upon successfully changing your password you will be prompted to Login again with your new credentials"

The rules and settings can be changed by a System Administrator, as explained below. We suggest that after the update is installed on your system that the System Administrator logs on first and configures the rules based on your own policies, if any, under the Security Policies section. This will ensure that all users who logon after these changes will by default comply with these policies. The default rules for usernames and password after the update are as follows:

- Minimum length of 5 and maximum length of 20 characters for usernames
- Minimum length of 5 and maximum length of 20 characters for passwords

## 2. Security Policy Configuration for User Logons and Password Credentials (82207)

A section called "Security Policies" has been added to the System Administration menu (see the "System Configuration" menu group). The new policy options are listed below. Values can be set or left on "0" to configure WorkPool to ignore and not implement that specific policy. For clients who host their WorkPool server on the Internet or a large local or public network we strongly advise to implement strict rules around access to prevent unauthorised access to their information.

Login Security	
Force users to change their password at first logon (default for profile)	: <input type="checkbox"/>
Force users to change their password after the following number of days	: <input type="text" value="0"/>
Automatically disable accounts after the following number of unsuccessful logon attempts	: <input type="text" value="0"/>
Automatically disable accounts after the following number of days of inactivity (no successful logon)	: <input type="text" value="0"/>

Username Policies	
Minimum character length	: <input type="text" value="5"/>
Maximum character length	: <input type="text" value="20"/>
Must contain uppercase and lowercase characters	: <input type="checkbox"/>
Must contain one or more special characters	: <input type="checkbox"/>

Password Policies	
Minimum character length	: <input type="text" value="5"/>
Maximum character length	: <input type="text" value="20"/>
Must contain uppercase and lowercase characters	: <input type="checkbox"/>
Must contain one or more special characters	: <input type="checkbox"/>











**Save**

Please note that in the unlikely event that all the System Administrators have locked themselves out of the system based on the rules they configured, i.e. after several failed attempts to log on, the WorkPool Support team must be contacted for further assistance. Such a request must come from the authorised party/ies on record and remote access to WorkPool must be provided (if not available by default). This request would be billable at standard support rates.

### 3. New System “Event Log” and Logging of System Events (82205 & 82204)

A new report called “Event Log” was added to the System Administration menu (see the “System Configuration” menu group). This log can be used to trace the following system events:

- Login
- Logout
- Delete
- Database Migrations during Upgrades
- System Start-up
- Password Change
- Login Failed
- General Security
- Custom Event

Event Type	Created On	Actor	Description
	2012/10/03 14:46	Demo User (3)	User Logged In
	2012/10/03 12:57	Demo User (3)	User Logged In
	2012/10/03 12:57	SYSTEM (SYSTEM)	WorkPool Started
	2012/10/03 12:47	Demo User (3)	User Logged In
	2012/10/03 12:47	SYSTEM (SYSTEM)	WorkPool Started
	2012/10/03 12:45	Demo User (3)	User Logged In
	2012/10/03 12:40	SYSTEM (SYSTEM)	WorkPool Started
	2012/10/03 09:33	Demo User (3)	User Logged In
	2012/10/03 09:24	SYSTEM (SYSTEM)	WorkPool Started
	2012/10/03 09:23	SYSTEM (SYSTEM)	WorkPool Started

Type of Event :

Created Date :  to

### 4. Changes to Internal Resource Administration (82207)

The following changes were made to the Internal Resource Administration section:

- A new column called "Last Logon" was added to the list containing the Resources, indicating the last date and time the user successfully logged on to the system.
- A new column called "Logon Status" was added to the list, indicating the current status of an account based on the rules defined in the security policy. Possible statuses would be:
  - **No logon**: Typically a new user, so they have not logged in yet (Last Logon = blank)
  - **Active**: Normal status.
  - **Expired**: No logon for last X number of days, where X is determined as per the policy setting.

- **Failed Logon:** Failed to logon X number of times, where X is determined as per the policy setting
- The "Personal Details" section of the Internal Resource screen was updated as follows:
  - A new checkbox was added below the "confirm password" field, called "User must change password at next logon". If checked, the user will be forced to change their password next time they logon. If the user completes this process successfully this box will be de-selected automatically on the user's profile. A user may not change their password to the same value, i.e. it must be a new password. When a system administrator changes (resets) a user password, they too will be required to enter an initial password value (and confirmation) that adheres to the same security policies. A password change/reset by an administrator will be logged as a security event.
  - A "Last Logon" and "Last Password Change" field was added to the screen.

## 5. Minor Changes and Bug Fixes

- a. **(82974)** Minor Change: Database maintenance was performed to remove some of the older tables used for backup purposes during migrations. These were no longer used.