

WORKPOOL RELEASE NOTES

WorkPool Version : 4.4.7.03
Release/Batch Number : 85835

Internal Build Date : 2013/01/18
Notes Prepared By : Marius Botha

Summary of Modules / Components Affected:

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

CHANGE LOG DETAILS

CALENDAR

1. Minor Changes and Bug Fixes

- a. **(85844)** Fixed Bug: Corrected an issue where the Calendar Event Audit Trail was not displaying line breaks correctly.
- b. **(86561)** Fixed Bug: The Event Description and Location was not copied across when cloning a Calendar event using the Ctrl-key + Drag and Drop method to create a new event.
- c. **(86589)** Fixed Bug: The Next Action Task Feed feature on the Calendar allowed a resource to update the Next Action dates of Tasks that were still in Transfer (i.e. not yet accepted). Next Action dates can only be set once ownership has been accepted.

COMMUNICATIONS (EMAIL & SMS/TEXT MESSAGE)

1. Separation of Email and Text Message Objects to Remove "Message" Object (85443)

From a system design perspective all of the message related entities (e.g. email, text message, announcement, etc) share common properties like a sender, a recipient, message content, priority, etc. It therefore made sense to store the common information in a way that made queries, comparisons and searching easier in code. However, due to the high volumes specifically associated to email communications, this method limits us from adding performance enhancements to speed up database performance, so even though the approach is architecturally sound we have decided to split the data so that it is now segmented per module. We have also configured indexes on the database based on this new structure and the result is a significant performance boost with regards to email communications.






2. New "Email Action Panel" (85727)










The effective and efficient management of email communication plays a key part in most businesses operations these days and incorporating this communication into the audit trail remains a significant requirement. The type of actions one may want to perform with an email message is also increasing (e.g. link it to tasks, folders, create new tasks, etc) so we have made a decision to consolidate all the actions on one panel as per example below.



This floating panel will appear at the top of an email, providing you with access to the typical functions you need as well as an expanded view to bring in more functions. This panel allowed us to reclaim some space on the screen and the layout allows the user to perform more actions with fewer clicks as the panel is always visible while viewing an email. For existing WorkPool users, please note that this change does take a while to get used to as old habits die hard, but once you have transitioned to the new way of working it becomes much easier and faster to deal with emails.

Below is a key of all the icons and their respective functions:

	Remove From Inbox As per the standard "Remove From Inbox" feature. In cases where an email is opened in its own Tab or Window, clicking on this icon will now automatically attempt to close the tab/window for you.
	Mark as Unread Resets the email to appear unread (bold text) in your inbox.
	Reply As before, allows you to reply to the sender of the email.
	Reply All As before, allows you to reply to all parties in the "To" and "CC" of an email.
	Forward As before, allows you to forward an email to another recipient.

	<u>Create New Task</u> This icon use to be located next to the Guess Tasks link. As before, it allows you to create a new Task with the current email linked to it.
	<u>Delete Email</u> As before, deletes the email from WorkPool.
	<u>Print Email</u> As before, displays a printer-friendly version of the content.
	<u>Message Notes</u> As before, displays audit trail of changes, e.g. link to Entry Folder and Tasks linked/unlinked to the email.
	<u>Create Email Template from Email Message</u> New feature. This option (available to Administrators only) will allow you to create an Email Template with this message content as source. This is great for setting up newsletters where you want to retain the content and layout of the email exactly.
	<u>Forward as Attachment</u> New feature. This will now forward the entire email as an attachment object (like Outlook). I.e. a new draft email will be created with this message as an attachment in a MIME format.
	<u>Message Headers</u> New feature. Displays a popup message with all the "header" information stored in the database, e.g. technical information on SMTP server, etc.
	<u>View Read Status</u> New feature. When sending an email to another WorkPool user, WorkPool tracks the status of that email and can therefore display this information to the user. This will show whether the email has been read, deleted, still in inbox, etc. (only applies to internal WorkPool users). Access to this information is restricted to the author of the email so the icon is only visible to him/her.
	<u>Import Message</u> As before, for users using direct IMAP this icon will download and import the email from the mail server. This icon will appear first and the email must be imported before the other icons above will appear.

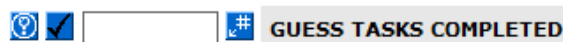
3. Changes to “Guess Tasks” Function on Emails (85727)

In the past, WorkPool would trigger the guess tasks function automatically whenever the Entry Folder was confirmed. If this folder contained many active tasks, e.g. in the case of a departmental or general administration folder, this could result in a lot of tasks being loaded, forcing the user to scroll down to find and link their task and then scroll down even further to remove the email from their inbox. The new email panel resolves the latter situation as it is always visible, however the following rule changes were implemented to address the automatic loading of tasks and access to historic information:

- If you open an email with a valid task number for the first time (i.e. not yet linked to a task or a folder) and you link the task and **then** the folder, WorkPool will not load all the active tasks in the folder as it assumes you have linked it to the task/s you wanted. You could then still run the guess tasks function manually, should you wish to retrieve the

list of active tasks. If you link the email to a folder first, the guess tasks function would still be called automatically as before.

- Upon completion of the guess tasks function, whether it was called by WorkPool automatically or by the user clicking on the guess tasks icon, an additional icon will now appear that will allow the user to retrieve recently signed off tasks (i.e. tasks that are no longer active but still potentially relevant). Using this function means that you no longer have to go into the directory, search for the client, open the folder and then search and copy/paste the task number of the signed off task into the email screen to link it. Instead, you can just click on the new button to retrieve the tasks and link the email to them directly from the same screen. WorkPool will not return **all** of the signed off tasks in the folder as this could potentially be thousands of tasks. Instead, it will assume you are looking for a fairly recent task so will return only the last 5 (i.e. 5 most recent) signed off tasks it can find in this folder. At present the number of tasks returned in this list cannot be configured.
- As per the screenshot below we have changed the old “Guess Tasks” link to an icon, to be consistent with the other functions on an email message.



4. Allow for Deletion of Emails from Disabled Mailbox (unsupported email)

Due to the recent increase of emails that do not conform to the international standard (deliberately or by accident) unsupported email has been on the rise. In an effort to allow users to manage their mail boxes directly from WorkPool and in so doing lessen the inconvenience of these unsupported emails, we have added this new feature.

As per the screenshots below, this feature becomes active after 5 failed attempts at processing an unsupported email and will present the following notification message in your “My Email” Screen.



Clicking on the Red Circle with the white cross will take you to the next screen as shown below. 

From the “Resolve Mailbox Error” Screen the user can select the email/s they wish to delete directly from the mailbox. Please note that Unsupported Emails will typically be automated response email/s, spam, unwanted news/chain letters or the oldest email in the mail box and to this end we display the “From” email address, the “Subject” and the “Sent On” date to assist you in determining the most likely cause of the unsupported email issue.

RESOLVE MAILBOX ERROR

Emails Found: 6

<input type="checkbox"/>	From	Subject	Sent On
<input checked="" type="checkbox"/>	emailmarketing@gopivotal.com	Network with the leaders at SpringOne2GX, Sept 9-12 2013	2013/08/22 21:19
<input type="checkbox"/>	vmwareteam@connect.vmware.com	Virtualize Your Entire Data Center	2013/08/27 11:31
<input type="checkbox"/>	vmwareteam@connect.vmware.com	Register Now for the Must Attend European IT Event of the Year	2013/08/29 11:17
<input type="checkbox"/>	news@bulksms.com	Newsletter August 2013	2013/08/29 15:47
<input checked="" type="checkbox"/>	emailmarketing@gopivotal.com	Don't miss the Pivotal event for Spring, Big Data and the Cloud	2013/08/29 22:12
<input type="checkbox"/>	vmwareteam@connect.vmware.com	Virtualization? Choose VMware vSphere with Ops Management	2013/09/06 11:31

Delete Emails

Once the suspected, unsupported email/s have been selected (by placing a tick in the relevant tick box/s) the user can press the “Delete Emails” Button to delete these emails.

PLEASE NOTE: This is a permanent delete and cannot be undone.

  MAILBOX FOR DEMO USER (LAST TIME SINCE DOWNLOAD 529 HRS 47.63 MIN) 

Once the Unsupported Emails have been deleted WorkPool will automatically activate your Mailbox for you and take you back to your “My Email” Screen. As in the example above the “Last Time Since Download” message may be present but this can be ignored as the message will disappear as soon as WorkPool has completed processing your mailbox for you.

5. Minor Changes and Bug Fixes

- a. **(85840)** Fixed Bug: WorkPool returned the user to the first page of their email inbox instead of the page they were last working on if they performed actions on these (like deletion or removing from inbox). This only applied to people with multiple pages (many emails) in their inbox.
- b. **(85848)** Fixed Bug: Mail servers allocate unique message ID's to email messages when they are sent. This message ID is stored in WorkPool when it is downloaded. In some rare cases (typically spam emails) this ID exceeded the 255 characters allowed for this field and as a result did not import the message. Code was changed to address this issue.
- c. **(85854)** Fixed Bug: Corrected an issue on the Email Search screen which ignored the “Date Range Criteria” specified (or applied it incorrectly).
- d. **(85855)** Change: Implemented support for GBK (Chinese) characters in filenames. This specifically relates to attachments on emails (typically received from BlackBerry devices).
- e. **(85989)** Fixed Bug: WorkPool did not allow users to send bulk emails in HTML format. This was fixed.

- f. **(86587)** Fixed Bug: The Mailbox “User Account Summary” screen did not exclude child (embedded) messages from the mailbox counter. Only applies to System Administrators.
- g. **(85816)** Change: Due to a recent change in the server address of one of our supported SMS Providers (specifically using FTP) we have updated the Text Message Services area in WorkPool to make these addresses configurable. In the past these addresses were hard-coded (static) and could not be changed.

DASHBOARD

1. Minor Changes and Bug Fixes

- a. **(85839)** Fixed Bug: The “Server Date” value on the dashboard (Intranet Home) was reading the value from the local browser/PC and not the server.

DIRECTORY

1. Changes to Adding New Attributes on Existing View Definitions (85849)

In the past, when a System Administrator attempted to add a new Attribute on a View Definition, the system would attempt to insert new fields (called Attribute Instances) on all the Views in the database in the same transaction. For systems with large record sets and/or slow hardware this could result in a timeout of the operation and therefore prevent an insert from completing properly. The code was changed to insert new records in smaller “batches” to reduce the load on the server, resulting in a significant performance increase.

2. Changes to Directory Entry Assimilation (now using Prepared Statements) (86024)

An Entry can literally have thousands of records linked to it (Tasks, Activities, Emails, etc) so the act of assimilating two entries means that all of these relationships must be updated to point to the new (remaining) Entry. As per point number 1 above, this action could require the system to use up a lot of its resources to complete the assimilation. Code was changed to perform these changes in batches (for technical users: prepared statements) and now completes much faster.

3. Minor Changes and Bug Fixes

- a. **(85853)** Bug Fixed: The “Batch File Import” ignored the "Close Task" setting when importing Files onto Tasks.
- b. **(85696)** Change: When configuring the Business Unit to Entry mapping on “File Data Sources” the assumption was that WorkPool could update all of the records with the

mapping provided by the Administrator. This meant that after the import (sync) was completed all the Entries affected by the import would now be published to the business units selected in the list, which may not be desired in cases where an Entry existed already with links to other business units. This would in effect lock out people who had access before from another Business Unit. An additional property has now been provided to allow the Administrator to configure if the “Publish Folder To” rule should add permissions, or replace permissions. The new options are as follows:

- a. Override and replace current business unit links with selection as above
- b. Retain existing links to business units and add selections above where necessary

FILES

1. Minor Changes and Bug Fixes

- a. **(85845)** Fixed Bug: Document Check-In did not update the document status.
- b. **(85847)** Fixed Bug: The system did not allow users to create new Document Folders with names that already existed somewhere in the tree. This was incorrect as the rule should only apply to folder names in the same folder, i.e. you cannot have more than one folder with the same name linked to the same parent folder.
- c. **(85851)** Fixed Bug: WorkPool allowed users to upload and link documents or URLs with names longer than 255 characters, even though we only store the first 255 characters. WorkPool now checks and warns users before saving the document.
- d. **(85856)** Fixed Bug: In cases where WorkPool deleted an object (like an Email or a Task) with other records linked to it which in turn had links to attachments that were invalid or missing, WorkPool did not complete the deletion process. This meant that some records would remain in the database until the problem could be determined and resolved for the deletion to complete normally. This is not a major concern as no data was lost, but it did create additional administration. After our changes WorkPool will now remove all the data, irrespective of whether the attachment can be found or not, as the attachment would be deleted anyway. Since very few companies allow for deletion of data in WorkPool (disabled by default), this bug only affected a few companies.

PROCESS MANAGEMENT

1. Stopping Process Instances with Reason (85841)

Some users clicked on the "Stop Process Instance" button by accident, or stopped processes without a good reason. The system will now prompt a user to enter a reason for stopping the process as well as acknowledge his/her actions for the record as per the screenshot below. In addition, the owner of the process will also be notified of the process being stopped via email.

The screenshot shows a confirmation dialog with the following elements:

- A text label: "Please confirm your reason for stopping this process :"
- A large, empty text input field with a vertical scrollbar on the right side.
- An "Acknowledgement" section containing a checkbox and the text: "I acknowledge that by stopping this process while it is still active I will cause all the tasks that may currently be active and process bound to be closed off automatically. The process cannot be reactivated later."
- A label: "Process Owner will be Notified : Marius Botha"
- A blue button at the bottom with the text: "Continue to Stop Process Instance"

2. Minor Changes and Bug Fixes

- a. (86466) Fixed Bug: After the changes to the Process Instance screen in the previous release the Process Manager and Process Initiator labels/fields on the screen was swopped around. This was corrected.
- b. (85852) Change: Process Instance Tasks (also called Parent Task) can now be transferred like any normal task.

TASKS AND ACTIVITIES

1. Changes to Task History: Limit Content, Filter Items and Expand/Collapse Detail (85698)

The rule-of-thumb in WorkPool is for users to manage tasks with a lot of content (i.e. Activities and Emails in the History) by splitting tasks into child tasks. Furthermore, since tasks can sometimes take on a life of their own we recommend that users change the Task Title whenever the scope of a Task changes to ensure that it will accurately reflect the content of the task. This is essential in cases where you may need to go back to a task (find it) several months later or for other users to be able to find this information in the future. That said, there can be cases where adding lots of Activities and Emails on the same Task make sense, e.g. when a Task is very old (open for a long time) or when adding this information will accurately reflect a single conversation or course of action taken in completing the task. The following changes were made to assist users to manage tasks with a large amount of information:

a. Configurable Limit on the number of Items to Display under Task History

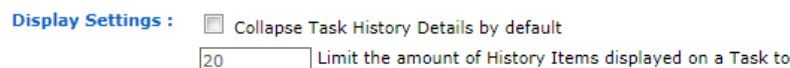
A new System Property and User Preference was implemented to allow the administrator & users to configure the number of items displayed under the Task History by default. This means that a user can configure a setting of a e.g. 100 that will result in WorkPool only showing the last 100 items on a task, i.e. Activities, Emails, Calendar Events, Announcements, Notes, etc. This makes the initial task loading a lot faster for “big” tasks and allow users to start capturing information without having to wait for the entire Task to load.

Setting Task Properties (Administrator)



Limit the amount of History Items displayed on a Task to :

Setting Personal Settings (All users)



Display Settings : Collapse Task History Details by default

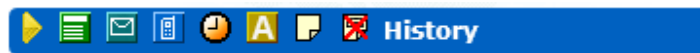
Limit the amount of History Items displayed on a Task to

An “Expand” option has been provided at the bottom of the history list to allow the user to expand and see the entire Task History as before, in cases where this is required. The number 100 would be configurable to 50 or any other number, although a number smaller than 20 does not make a lot of sense in practice. The value set by the System Administrator will apply by default to all users who do not have their own setting

configured. Limiting the number of items displayed under the History section reduces the screen loading time and has a positive effect on system performance.

b. Task History Filter:

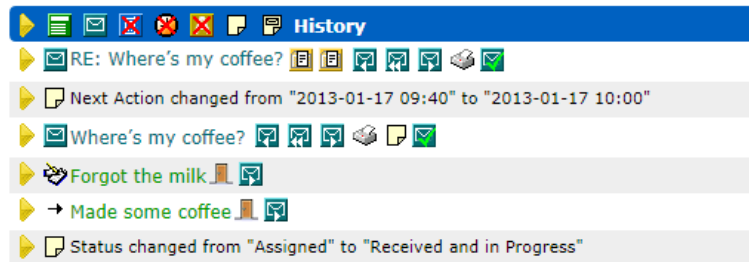
A user can now choose to show/hide Task History content by using a new icon bar with a list of filters. This feature allows users to show/hide Activities, Emails, SMS'es, Calendar Events, Announcements and Task Notes (audit notes) based on their requirements for printing or discussion purposes (e.g. to illustrate actions taken or emails sent). This function is useful for taking out audit notes such as changes to next action dates to make the history easier to read when dealing with non-WorkPool users. The filter is only active (remembered) while the user works on that specific task screen and will automatically reset to show all information again the next time the user opens a task screen, including opening the same task again. An additional filter icon was added to show Audit Messages, i.e. email and text message notifications. This information as previously hidden from view and therefore information is not shown by default.



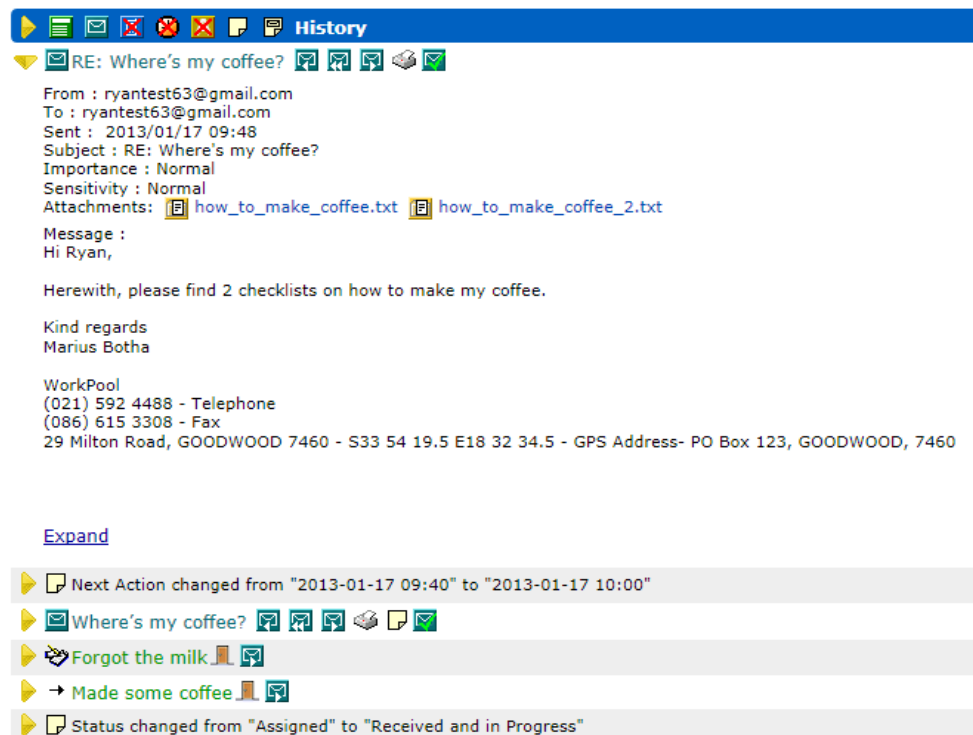
c. Expand / Collapse Task History Content

Due to popular demand we now have a feature where users can work with items under the Task History section in a collapsed or expanded fashion. Until now the default has been to display all content in an expanded format, i.e. all items such as emails and activities would always display both the title and content to the user. The new collapsed view allow users to view items as single line entries, reflecting only the title of the activity or email subject, along with information like the author, date and attachments. The user can now choose to expand one or all of these items as required. An alternating "Expand All" and "Collapse All" icon is provided to expand or collapse all items with a single click.

Example of Collapsed History Items



Example of traditional, expanded History Items



A user can configure their default preference under the “Custom Interface Settings” section under “My Profile”.

Display Settings : Collapse Task History Details by default

2. Changes to Personal Task Settings (Notification and Archive Options) (85812)

In the past, new task notifications (both email and text message notifications) were triggered based on the "Priority" value of the task, e.g. Critical, Important, Normal, Low Importance. See screenshot below for original settings.

Personal Task Settings

Email Notifications : demo@workpool.co.za

Critical
 Important
 Normal
 Low Importance

Exclude tasks assigned to me by myself (including groups and recurring tasks)
 Notify me of any changes to my Tasks where I am not the Owner
 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
 Disable Task Completed Notifications on Process Tasks

Mobile Notifications : [Not specified](#)

Critical
 Important
 Normal
 Low Importance





Automatically archive tasks : Completed by me where I am the Owner and the Resource
 Signed off by me
 Completed by me upon creating the task
 Signed Off as part of a process where I am the Owner of the task

[Save](#)

Above-mentioned triggers will remain in place, however will no longer be the core/main driver of the notification settings. Users can now apply exclusions to this option to reduce the number of notifications they receive in cases where it is clearly not required. The section was also improved to more clearly distinguish between the settings applicable to **new** tasks as opposed to notification settings that apply to changes on **existing** tasks. Settings can also be changed by the System Administrator under the Internal Resources administration section. The same options can now be configured for both email and text message (SMS) notifications:

Notify me of New Tasks where

The Task Priority is :

- All Priorities
-  Critical
-  Important
-  Normal
-  Low Importance

Exclude Tasks created by me where :

- I am the Resource (i.e. assigned to myself, by myself)
- I am a member of the Resource Group I am assigning the task to

Exclude Tasks created by Recurring Tasks where :

- I am the Owner and Resource on the Task but not the Recurring Task Manager
- I am the Owner and member of the Resource Group on the Task but not the Recurring Task Manager

Notify me of Changes to Existing Tasks when

- The Owner of a Task changes the details of a Task assigned to me
- Other users add Activities to my Tasks, i.e. where I am the Resource
- Someone else adds an Activity to a Task I am tracking (not tasks assigned to me)

Disable Task Completed Notifications on

- Normal Tasks
- Process Task

The Task Archiving options have been moved to the bottom of the screen into a group of their own.

Automatically archive tasks :

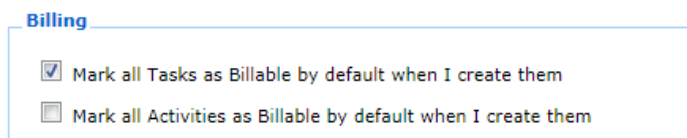
- Completed by me where I am the Owner and the Resource
- Signed off by me
- Completed by me upon creating the task
- Signed Off as part of a process where I am the Owner of the task

Please Note: In an ideal situation we do not want any email or text message notifications to be sent. People should be looking at their task lists and not use (or rely on) email notifications to manage their tasks. Using task lists (only) to manage your work is in our opinion a hallmark of an advanced WorkPool user, where such a person will apply recognised industry standards and time management principles in planning and executing their work on a daily basis. It is in fact risky to rely on email notifications to track new tasks as an email might never arrive due to issues with the email server or network infrastructure. This could result in users not performing critical tasks on time or put this forward as a convenient excuse for not attending to a task if they claim no such notification was received. That said, for many people task notifications add a lot of value and assist them in attending to their work in a timely manner.

3. Allow User Configuration of “Billable” Property on Tasks and Activities (85813)

The following rules and changes were introduced with regards to the “Billable” field on Tasks and Activities:

- a. If a Task is marked as Billable, then the "Billable" checkbox on the "Add Activity" panel at the bottom of the Task must be checked by default. A user can then uncheck it if the activity is not billable.
- b. Billing preferences were added to the "Personal Task Settings" to allow the user to configure the following defaults:
 - *Mark all Tasks as Billable by default when I create them*: The Billable checkbox on the Add Task screen will be ticked by default.
 - *Mark all Activities as Billable by default when I create them*: If the task you are logging an activity on is not marked as billable (i.e. this falls outside the scope of the option above) then this option will default ALL activities they create, on tasks or standalone, to have the Billable checkbox ticked.



4. Minor Changes and Bug Fixes

- a. **(85850)** Fixed Bug: Users can create links to Tasks by using the [TASK:1234] format, where 1234 would be the task number. In cases where users entered invalid or reserved characters, such as “###” the link could open an invalid task or display an error message. All invalid numbers will now display an error message explaining that the task could not be found.
- b. **(85987)** Fixed Bug: The “Time Spent” value was listed in a red colour under the “Metrics” panel, when it should turn red when the time spent is larger than the estimated value.
- c. **(85838)** Change: Some email and text message screens would display the task tag in mixed case, i.e. [Task:XXX] instead of all uppercase such as [TASK:XXX]. Uppercase is the correct format.
- d. **(86646)** Fixed Bug: The Bulk Task Scheduler (under Entry Folder) was displaying an error message on the screen after updating tasks.

WORKPOOL SYSTEM ADMINISTRATION

1. Changes to Resource Time Management (85837)

The “Time Management” screen was changed to allow for a decimal value to be captured in the “Days Leave per Month” field. Some of the other fields were renamed and additional error checking built in to ensure values do not conflict.



Time Management

Working Day Start Time :

Working Day End Time :

Lunch Period Start :

Lunch Period End :

Working Hours Per Day :

Working Hours Per Week (Min) :

Working Hours Per Week (Max) :

Cost to Company Per Hour :

Rate Per Hour :

Days Leave per Month :

2. Support for InnoDB Migrations (in addition to the MyISAM Standard) (85842)

When a WorkPool server is updated with a new version, the system will automatically migrate the structure of the database as well as your current data to the new structure. Until recently we only supported the original MyISAM database engine for MySQL; however due to popular demand we have now also added support for the InnoDB database engine for clients on this configuration. MyISAM will however remain the default engine configuration.

3. Minor Changes and Bug Fixes

- a. **(85988)** Fixed Bug: A System Administrator could remove his/her own Admin privilege under Internal Resource Administration. This would result in the Administrator locking him/herself out of the system as they cannot reset their own System Admin privilege.
- b. **(86011)** Fixed Bug: The “File Upload Properties” screen did not allow the Administrator to change from the HTTP to FTP protocol unless they also changed the Directory Location, which property was not applicable to HTTP.